SYNERGY INTERNATIONAL SYSTEMS

PUBLIC SECTOR INVESTMENT DATABASE FOR LESOTHO

(PSID LESOTHO)

ANALYTICAL INTERFACE

USER MANUAL

Version 1.1

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1. INTRODUCTION

The purpose of this document is to describe how the *Public Sector Investment Database for Lesotho (PSID Lesotho)* application functions and to provide the necessary instructions to ensure successful work with the application. Use of this document and compliance with the standards specified herein is mandatory for anyone working with the mentioned application.

2. OVERVIEW

The *Public Sector Investment Database for Lesotho (PSID Lesotho)* is an automated information management system which is designed to improve efficiency and coordination of the efforts made by the Ministry of Planning of the Kingdom of Lesotho with the aim of tracking the external projects funded by the Development Partners and country government. The system serves as the main database and data collection and reporting tool for MoP as it ensures effective access to development data as well as provides an insight into the external projects and programs currently being implemented in the country.

The main objective of *PSID Lesotho* is to serve as a reliable and credible source of information on external projects implemented in Lesotho to support the Government in effectively monitoring the progress and performance of projects and programs and ensuring the their alignment with the Government's development goals, priorities, and strategies. Moreover, *PSID Lesotho* promotes transparency and accountability of funds, improves governance, supports project implementation, and facilitates results-based decision-making on development assistance in Lesotho.

PSID Lesotho is a powerful tool for data visualization, analysis, and reporting. It presents the data in the application in highly visual ways and puts the power of analytics directly into the user's hands with a wide array of sophisticated but easy-to-use tools. Using the robust reporting capabilities that *PSID Lesotho* offers, users can build powerful reports for informed decision making with the application drag-and-drop interface. These reports can further be saved, printed, or exported to various formats.

PSID Lesotho is designed to provide quick access to the data on external projects and programs implemented in the country remotely via Internet. Once you have accessed this application, you are able to view the data stored in it, monitor the project / program implementation, and create real-time analytical reports in the *List*, *Chart, Map*, and *Report* modules of the application. Moreover, you can add new information or modify the existing one through a built-in online *Data Entry* module.

PSID Lesotho provides a web-based user interface and requires a web browser pre-installed.

3. PSID LESOTHO LOGIN SCREEN

The starting screen of the *PSID Lesotho* application is the *Login Screen* (Figure 1). It serves as a gateway to viewing, analyzing, and modifying the data in the application. It ensures high level of security of the sensitive information that the application can contain and prevents it from being compromised as it enables full access to the application data for registered users only.

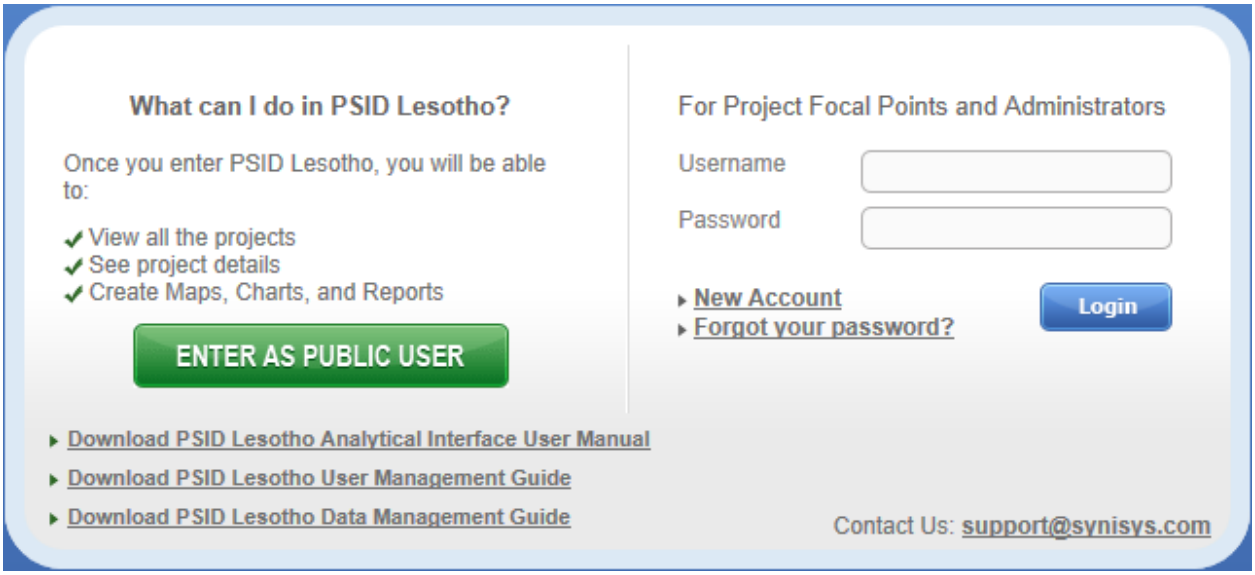

What can I do in PSID Lesotho?
Once you enter PSID Lesotho, you will be able to:
View all the projects
See project details
Create Maps, Charts, and Reports
ENTER AS PUBLIC USER
For Project Focal Points and Administrators
Username
Password
New Account
Forgot your password?
Login
Download PSID Lesotho Analytical Interface User Manual
Download PSID Lesotho User Management Guide
Download PSID Lesotho Data Management Guide
Contact Us: support@synisys.com

Figure 1: PSID Lesotho Login Screen

Note: Although unregistered users may access *PSID Lesotho*, the application data will be available to them for viewing purposes only. For more details, see Accessing PSID Lesotho without Registration.

3.1 Logging into PSID Lesotho

Users who have already registered for an account for *PSID Lesotho* will need to log into the application to start using it. To log in, you should validate yourself with the username and password and then click the **Login** button in the *Login Screen* (Figure 1).

Note: The password is case sensitive.

Note: If you have failed to log in several times, the application will be blocked. Contact your system administrator to unlock your user access. The number of unsuccessful login attempts is defined by the login policies adopted for the application.

3.2 Recovering Your Password

The accounts of registered users in *PSID Lesotho* are password-protected. This means that you need to validate yourself with a username and password every time you log into the application.

If you have forgotten your password, you can retrieve it by clicking the **Forgot your password?** link in the *Login Screen* (Figure 1) and authenticating yourself. After submitting your identity information, your password will be reset and a new password will be sent to the e-mail address associated with your user account.

After you log into the application with the received password, you are recommended to change it. For more details on how you can manage your personal and account information, see Registering a New User.

3.3 Registering a New User

If you are new to the system and you need a personal account, sign up for a username and password to start using the system.

To register in the system, follow the steps below:

1. Click the **New Account** link in the *Login Screen* (Figure 1). A *User Registration* form will appear (Figure 2).
2. Fill in the information requested.
3. Click the **Create account** button to submit the inserted information.

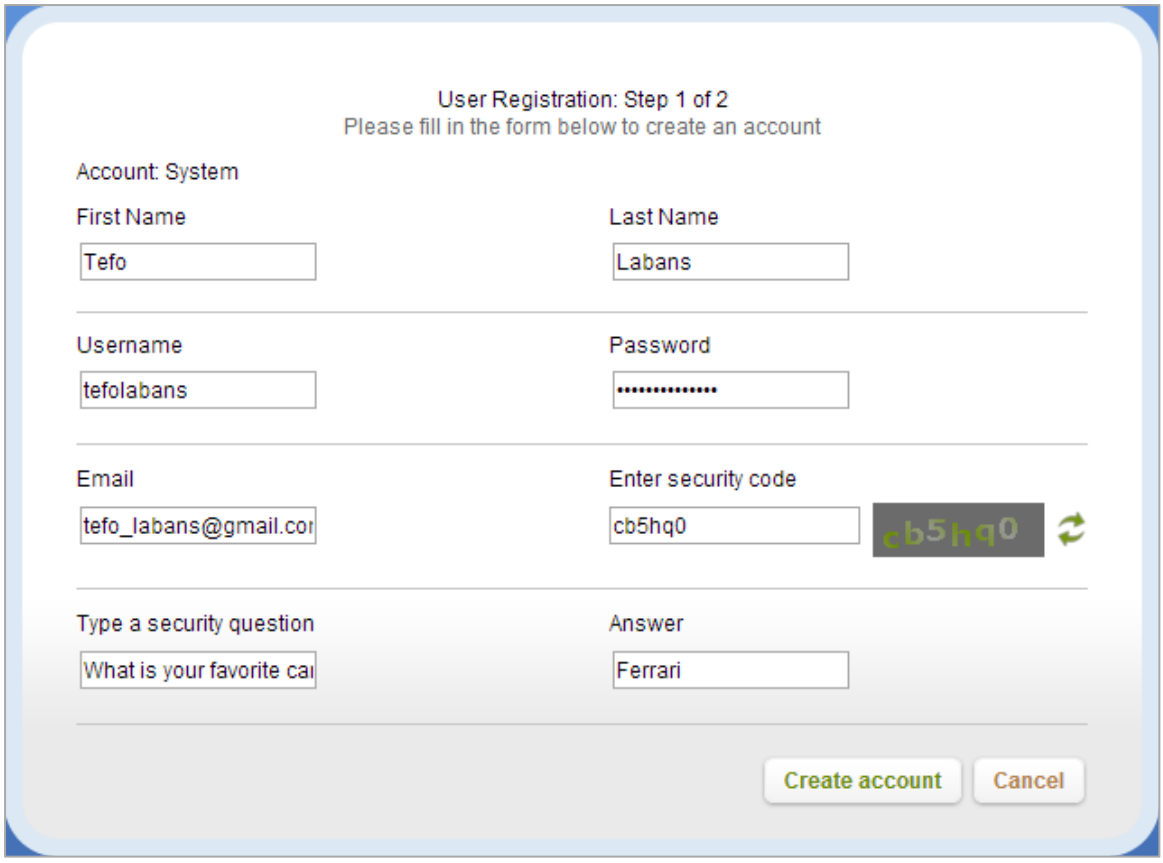


Figure 2: User Registration Form

Note: You will not be able to log into the application unless the administrator approves your registration.

After your registration has been confirmed, you can log into the application to start using it. For more details, see Logging into PSID Lesotho.

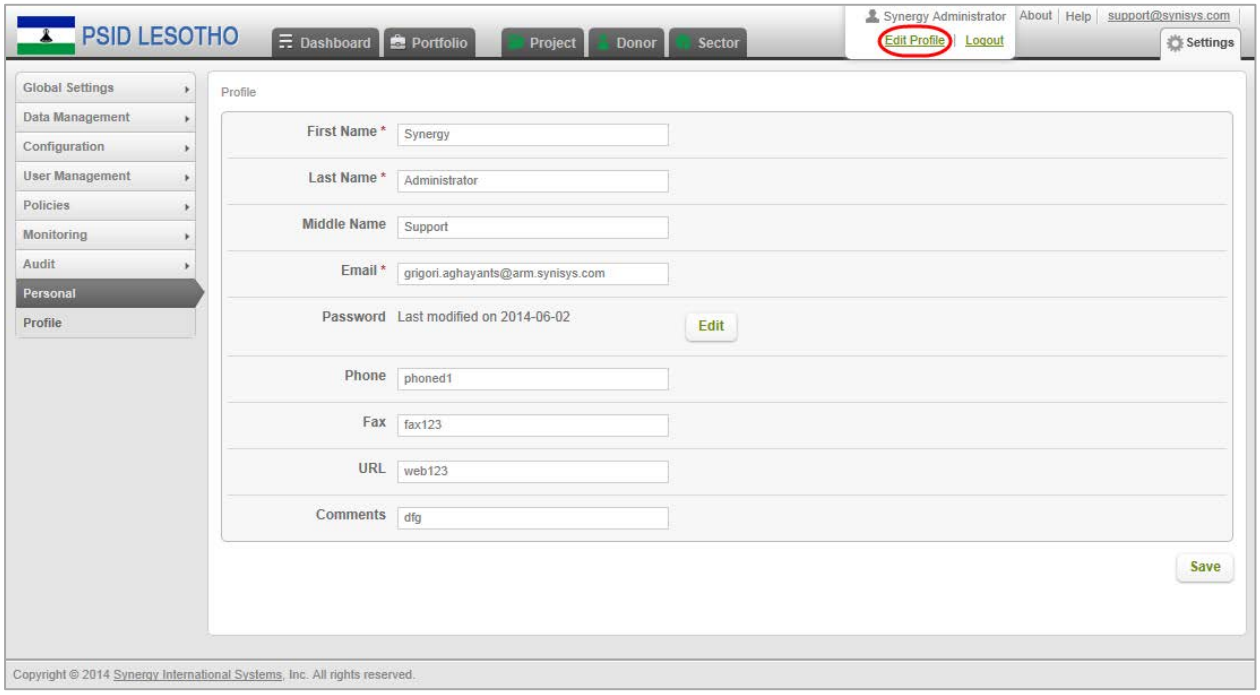


Figure 3: Profile Section

Once logged in, you can manage your personal details, i.e. change the data (e.g. username, password, email, etc.) provided during registration. To edit your personal details, log into the application, go to the *Profile* section (Figure 3) and make the appropriate changes in the data displayed. For more details on how you can access the *Profile* section, see PSID LESOTHO APPLICATION STRUCTURE.

3.4 Accessing PSID Lesotho without Registration

To ensure more flexibility and to provide access to a wider range of users, the system is designed in such a way that it allows public users to enter it without registration.

Public users wishing to view data should click the **ENTER AS PUBLIC USER** button in the *Login Screen* (Figure 1). They will be directed to the application with viewing permissions only.

4. PSID LESOTHO APPLICATION STRUCTURE

PSID Lesotho consists of the following main sections:

- DASHBOARD SECTION – used for quick access to the pre-defined reports stored in *PSID Lesotho*.
- PORTFOLIO SECTION – used for quick access to the projects and activities registered in the *PSID Lesotho* application by the user's group.
- **PROJECT / DONOR / SECTOR** – used to present the data related to the projects/donors/sectors that are registered in the *PSID Lesotho* in different forms:
  - LIST MODULE – used to create and execute ad-hoc queries on the data and acquire results in form of a list.
  - CHART MODULE – used to filter and display the data in a chart form.
  - MAP MODULE – used to filter and display the data in a map form.
  - REPORT MODULE – used to generate complex reports over one or more criteria and present the output in the printable and user-friendly format.

The *PSID Lesotho* main window has a complex preview as it is shown in Figure 4.

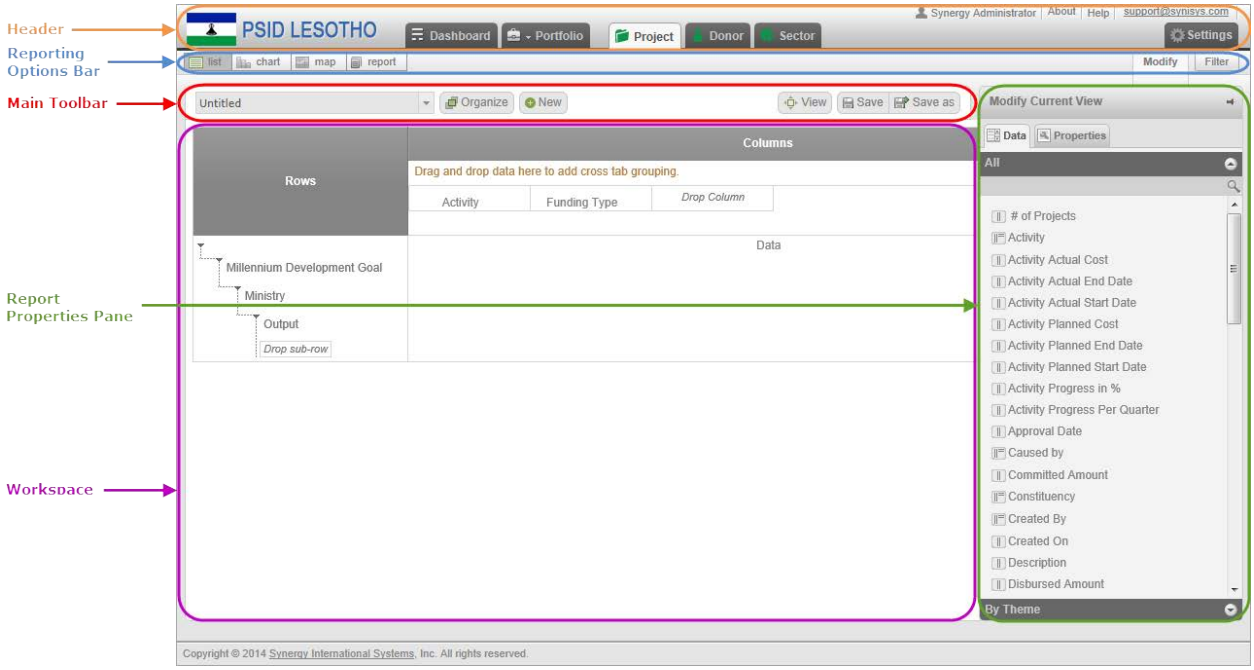


Figure 4: PSID Lesotho Application Design Mode Window Structure

It contains the following components:

Component Name	Description
Header	This is the application header that contains the application name and logo. On the right side, the following functions are available: • **User Name** – the name of the user logged in the *PSID Lesotho* application. o ***Edit Profile*** – this opens your personal settings

	and details. For details, see Registering a New User. o ***Logout*** – this button is used to log off the application. • **About** – opens the *PSID Lesotho* information window. • **Help** – opens the *PSID Lesotho* application help. • **Contact info** – e-mail address of the *PSID Lesotho* System Administrator. The following tabs are available here: • **Dashboard** – opens the DASHBOARD SECTION to manage the executive dashboards stored in the application. • **Portfolio** – opens the PORTFOLIO SECTION to manage user specific projects. • **Project / Donor / Sector** – opens the *Project/Donor/ Sector* dataset of the *PSID Lesotho* application. • **Settings** – opens the administrator's tools of the *PSID Lesotho* application.
Reporting Options Bar	This is the main toolbar of the *PSID Lesotho* application. The following tabs are available here: • **List** – opens the LIST MODULE. • **Chart** – opens the CHART MODULE. • **Map** – opens the MAP MODULE. • **Report** – opens the REPORT MODULE. • **Modify** – allows changing the view displayed in the selected module. • **Filter** – contains filtering options. For details, see FILTERING.
Main Toolbar	This is the main toolbar of the *PSID Lesotho* application. The following main functions are available here: • **Pre-defined Report Selector** – contains a list of pre-defined lists / charts / maps / reports (depending on the opened module) available to the application users. • **Organize** – switches to the *Organize* mode of the *PSID Lesotho* application where you can see the list of the existing reports, add new report groups, re-organize the existing groups, etc. • **New** – creates a new list / chart / map / report (depending on the opened module). • **Update –** is used to apply the changes made to the report structure. • **View** – switches to the *View* mode of the *PSID*

	Lesotho application where you can view the data presented in the form of different reports. • **Design** – switches to the *Design* mode of the *PSID Lesotho* application where you can build reports and assign different properties to the report components. • **Save** – saves a list / chart / map / report (depending on the opened module) so that it can be shared with other users. • **Save as** – saves a list / chart / map / report (depending on the opened module) as a new one. • **Print** – allows printing the selected chart / map / report. • **Export** – allows exporting the selected chart / map / report in the MS Word, MS Excel and PDF formats.
Report Properties Pane	In this frame, all report components and properties that can be assigned to them are managed.
Workspace	In this frame, all datasets, sections and modules are managed. Here are filtering and search results displayed.

5. DASHBOARD SECTION

In the *Dashboard* section of the *PSID Lesotho* application (Figure 5), you can make use of this reporting tool to easily create meaningful dashboards to visualize and drill down through a wealth of information for effective decision-making. It empowers you to create dashboards and add reports to them, interpret and extend your dashboard reports and analyze report data in real-time.

The *Dashboard* tool provides you with an at-a-glance perspective of the data included in the dashboard reports, allows monitoring critical issues, and assists in identifying areas that need immediate attention.

You can make use of the intuitive drag-and-drop environment that the *Dashboard* tool offers for leveraging information assets in real-time through visually rich, responsive and personalized business intelligence dashboards. This way, you will achieve better data interpretation and, as a result, more informed decision making.

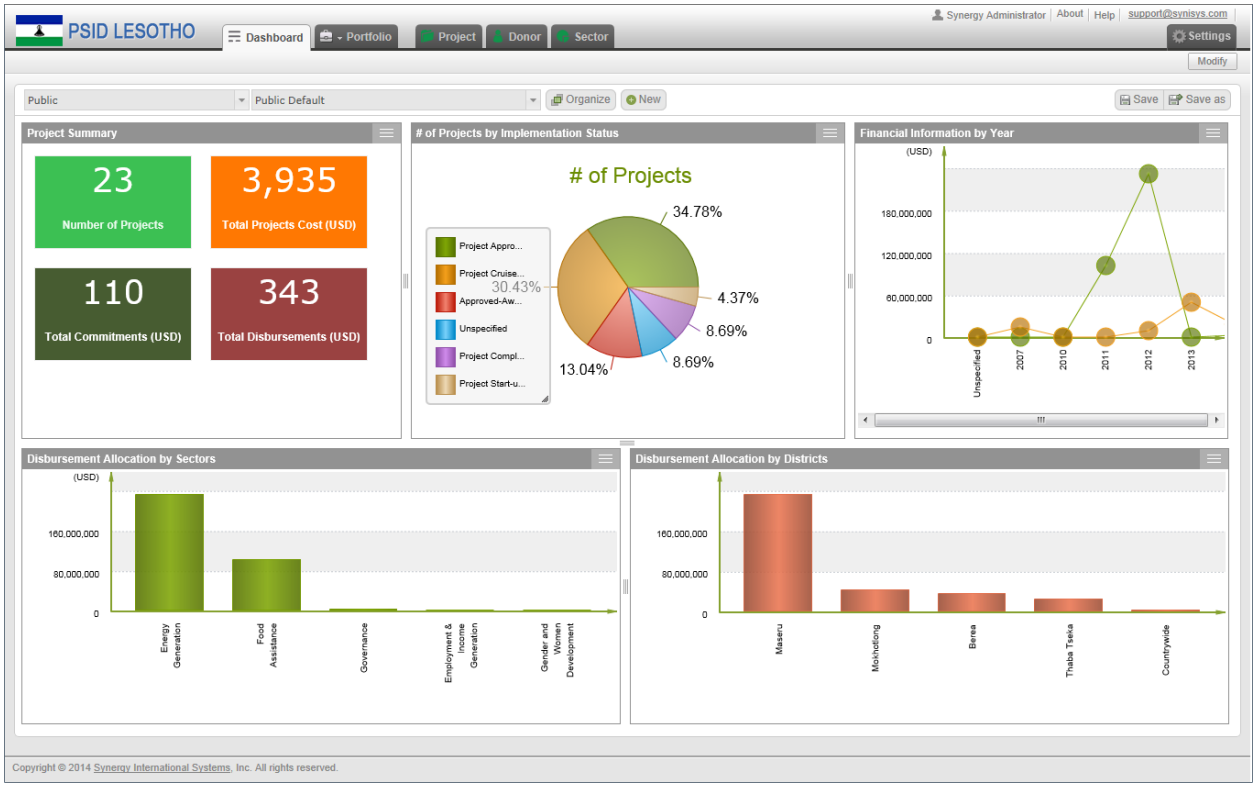


Figure 5: Dashboard Section

5.1 Accessing the Dashboard Module

To access the *Dashboard* section, click the **Dashboard** tab in the *PSID Lesotho* header. You will be navigated to the *Dashboard* section (Figure 5). In this section, you can create dashboards, include reports under them, set their properties, etc.

5.2 Creating a New Dashboard

To create a new dashboard, follow the steps below:

1. Go to the **Dashboard** tab of the *PSID Lesotho* application.
2. Click the **New** button in the reporting options bar. The *Modify Current View* panel will appear (Figure 6).
3. Select the reports that you want to add to the dashboard. For details, see Adding a Report to the Dashboard.
4. Select the controls that you want to add to the dashboard. For details, see Adding a Control to the Dashboard.
5. Set dashboard properties. For details, see Setting Dashboard Properties.

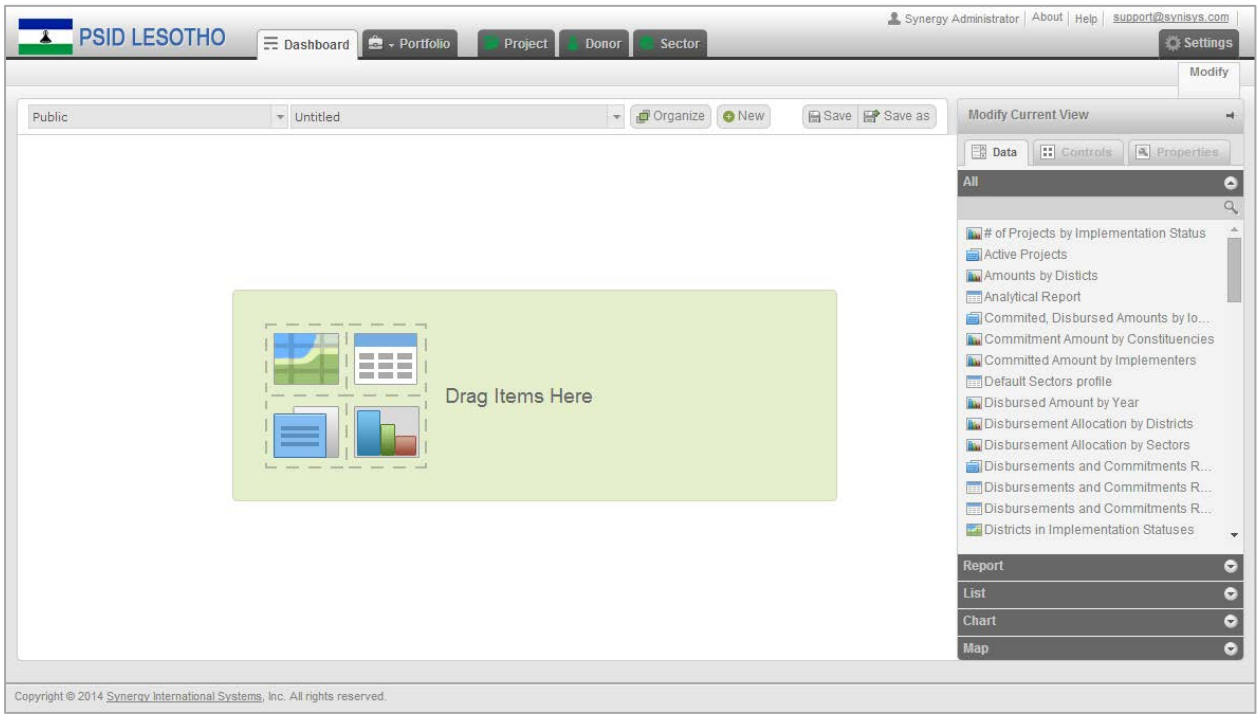


Figure 6: Creating a New Dashboard

5.2.1 Adding a Report to the Dashboard

To add a report to the dashboard, follow the steps below:

1. In the *Data* tab, select a report to add to the dashboard and drag-and-drop it to the main screen.

   Note: You can select to add a report to the dashboard browsing in the entire list of reports in the *All* sub-tab. Or, you may do it in other sub-tabs where the pre-defined reports are grouped according to a common feature (report type) they share.
2. If you want to add another report to the dashboard, select it in the list, drag it onto the main screen and hold the left mouse button until a green rectangle appears on the screen indicating an area where the new report can be placed (Figure 7). Once the rectangle becomes blue, release the mouse button.

Note: The reports can be arranged either in vertical or horizontal order.

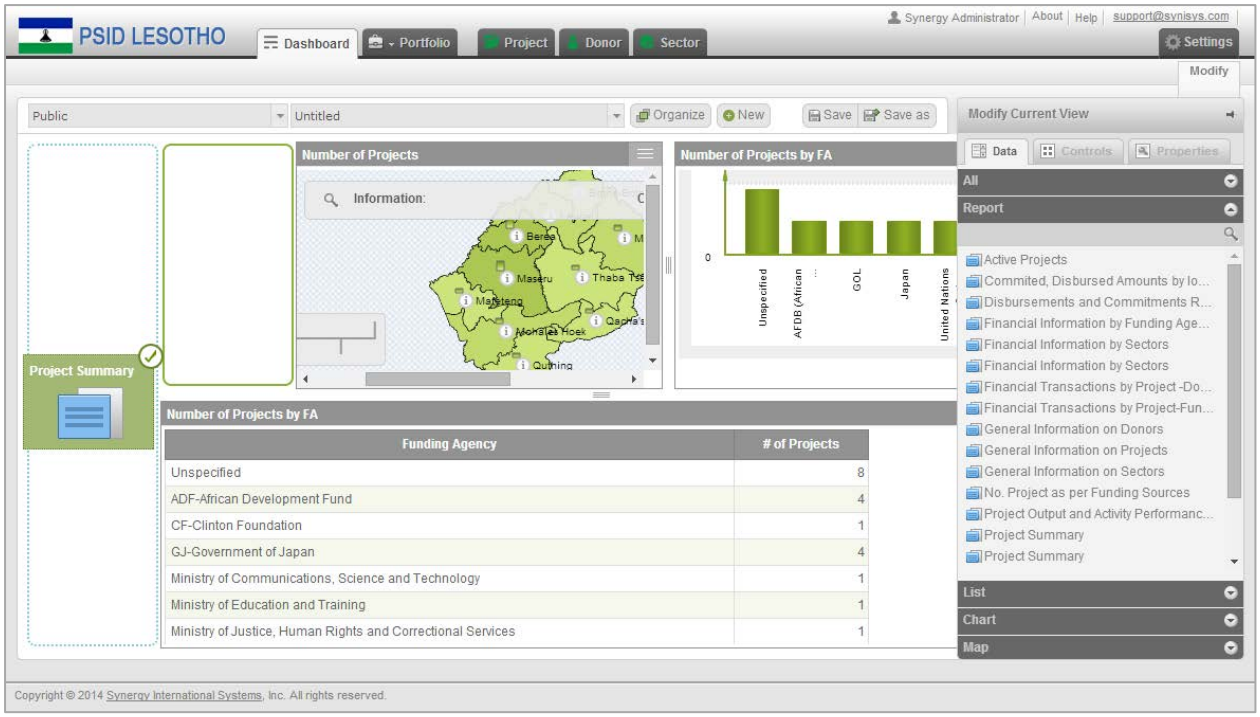


Figure 7: Adding a Report to the Dashboard

5.2.2 Adding a Control to the Dashboard

In the *Dashboard* section, you can select to add controls (e.g. filtering control) to your dashboard and apply it to the reports included in it.

To add a control to the dashboard, follow the steps below:

1. In the *Controls* tab, select a control to add to the dashboard and drag-and-drop it to the main screen (Figure 8).
2. If you want to add another control to the dashboard, select it in the list, drag it onto the main screen and hold the left mouse button until a green rectangle appears on the screen indicating an area where the new control can be placed. Once the rectangle becomes blue, release the mouse button.

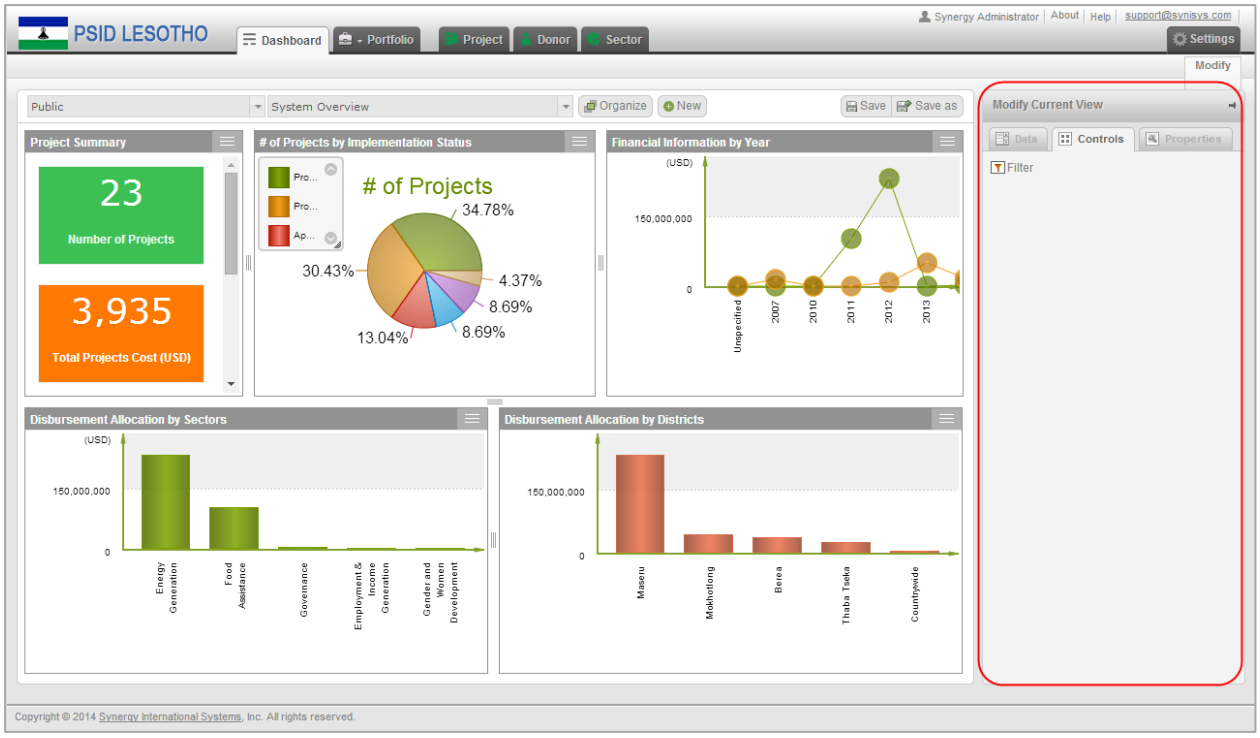


Figure 8: Adding a Control to the Dashboard

5.2.3 Setting Dashboard Properties

To assign certain properties to a dashboard, follow the steps below:

1. Switch to the *Properties* tab of the *Modify Current View* panel (Figure 9).
2. Tick the **Scroll Mode** checkbox to toggle the scrollbar thus allowing additional space for adding reports to the dashboard.

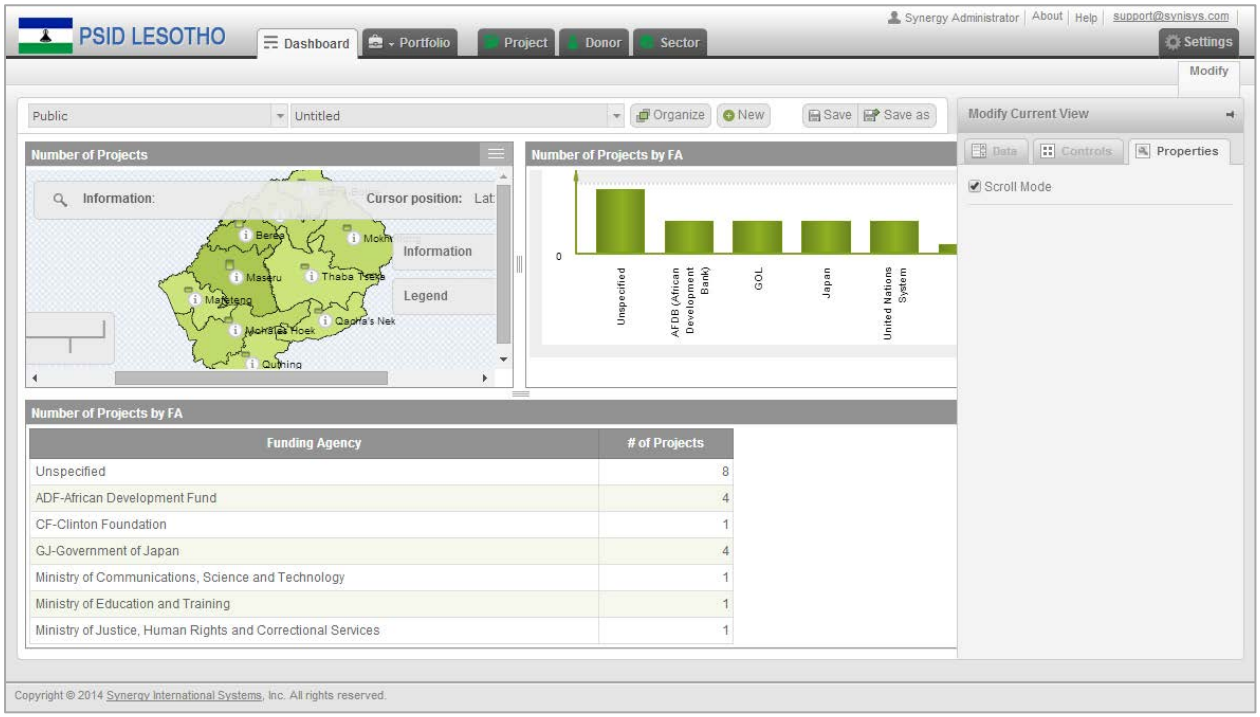


Figure 9: Setting Dashboard Properties

5.3 Managing Dashboard Reports

The reports that are included into dashboards can easily be managed.

5.3.1 Refreshing Reports

For decision-makers and other stakeholders, it is essential to access the latest data included in the reports to ensure more informed decision making. To serve this purpose, the *Dashboard* tool provides you with the possibility of refreshing the reports, i.e. loading the latest data from the database.

To refresh a report, follow the steps below:

1. Hover the mouse cursor over the button found in the report caption toolbar.
2. Select the **(Refresh)** option from the actions menu that appears (Figure 10). All the latest data will be reflected in the report.

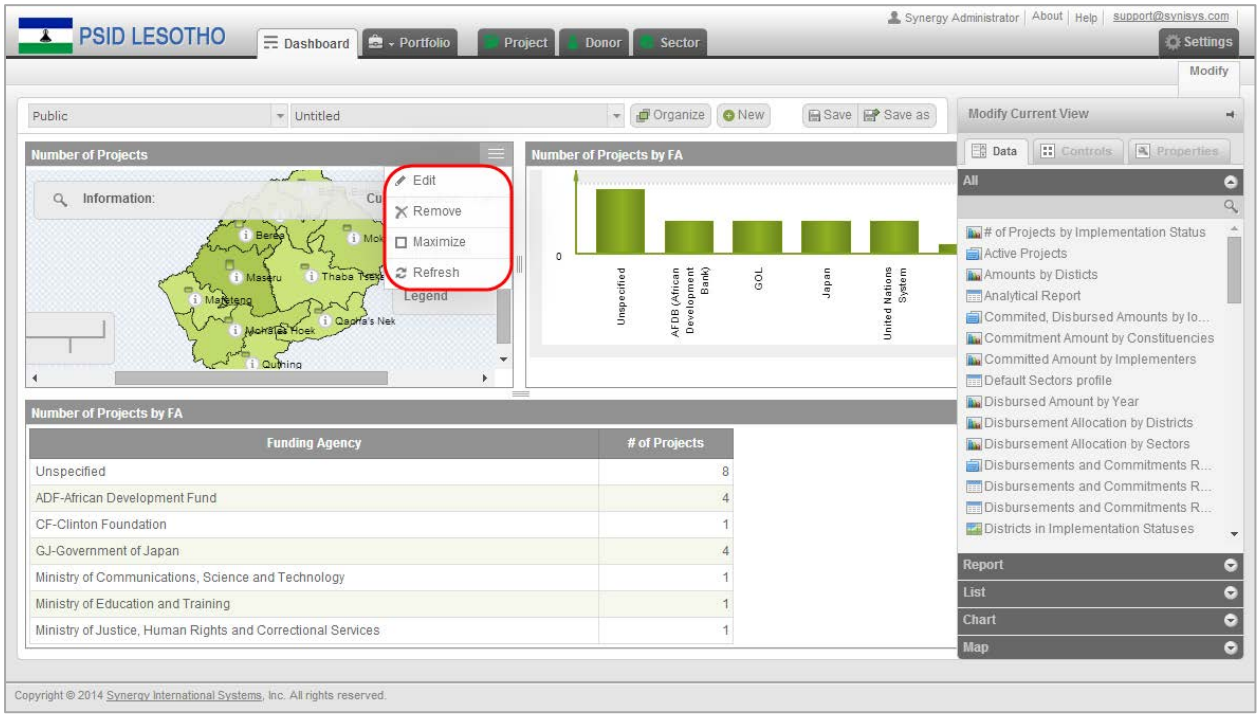


Figure 10: Performing Actions over the Dashboard Report

5.3.2 Maximizing / Minimizing Reports

In the *Dashboard* section, you can maximize an individual report included into your dashboard to have a better view of the data that it contains.

To maximize a report in the dashboard, follow the steps below:

1. Hover the mouse cursor over the button found in the report caption toolbar.
2. Select the **Maximize** option from the actions menu that appears (Figure 10).

When you have finished analyzing the data in the report, you can minimize the report window to return to your dashboard.

To minimize a report window, follow the steps below:

1. Hover the mouse cursor over the button found in the report caption toolbar.
2. Select the **Minimize** option from the actions menu that appears (Figure 10).

5.3.3 Applying Filtering to the Dashboard Reports

In the *Dashboard* module, you can apply filtering to the reports included into your dashboard to drill down through the large-volume data that a report can contain.

To apply filtering to the dashboard reports, follow the steps below:

1. Add a filtering control to your dashboard. For more details, see Adding a Control to the Dashboard.
2. Set the filtering condition that the data in the reports should meet. For more details, see Setting Filtering Control Options. Please note that you can build complex filtering criteria with an almost unlimited number of conditions.
3. Click the **Save** button to apply the filtering criteria created.

5.3.4 Removing Reports

To remove a report from the dashboard, follow the steps below:

1. Hover the mouse cursor over the button found in the report caption toolbar.
2. Select the **Remove** option from the actions menu that appears (Figure 10).

5.4 Customizing a Dashboard

The *Dashboard* tool in the *PSID Lesotho* application allows you to create your dashboards to display and organize the content that you want to view. For each dashboard that you create, you can customize the report containers by assigning them certain properties, like background color, captions, etc. Moreover, you can assign properties to the controls that you have added to your dashboard.

This chapter will guide your through the steps that you should take to create a custom dashboard.

5.4.1 Setting Report Container Options

To style a report container, follow the steps below:

1. Hover the mouse cursor over the button found in the report caption toolbar.
2. Select the **Edit** option from the actions menu that appears (Figure 10). The following options become available on the *Properties* tab (Figure 11):

Property Field	Description
Show Caption	Define whether the report container should have a caption by selecting the respective checkbox.
Caption	This field appears if the *Caption* checkbox is selected and allows entering the piece of text that will appear as the report title.

Color	Select the color in which the report title will be displayed above the report.
Background Color	Select the color for the report caption background.
Show Border	Specify whether the report container should have a border surrounding it. Please note that the report container will display in the color selected for the report caption background.

3. Click the **Save** button to apply the changes made.

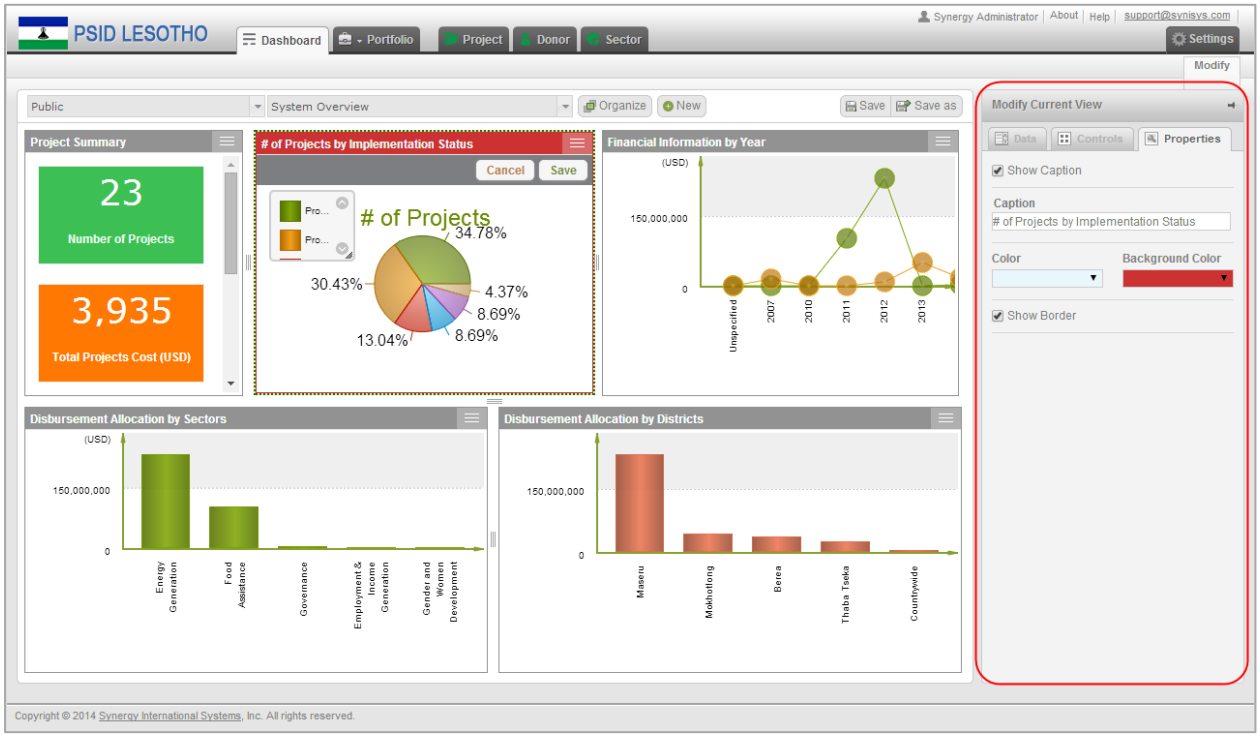


Figure 11: Setting the Report Container Properties

5.4.2 Setting Filtering Control Options

To set the filtering control options as well as to create filtering conditions, follow the steps below:

1. Hover the mouse cursor over the button found in the filtering control toolbar.
2. Select the **Edit** option from the actions menu that appears. The following options become available on the *Properties* tab (Figure 12):

Property Field	Description
Show Caption	Define whether the control container should have a caption by selecting the respective checkbox.
Caption	This field appears if the *Caption* checkbox is selected and allows entering the piece of text that will appear as the filtering control title.
Color	Select the color in which the filtering control title will be displayed above the control.

Background Color	Select the color for the filtering control caption background.
Show Border	Specify whether the filtering control container should have a border surrounding it. Please note that the report container will display in the color selected for the filtering control background.
Dataset	Specify what dataset (project, donor, or sector) the filtering condition will be based on.
Filtering Condition	Build a filtering condition to apply to the report included in the dashboard. For more details, see FILTERING.
Dependents	Select the report to which the filtering condition will be applied.

3. Click the **Save** button to apply the changes made.

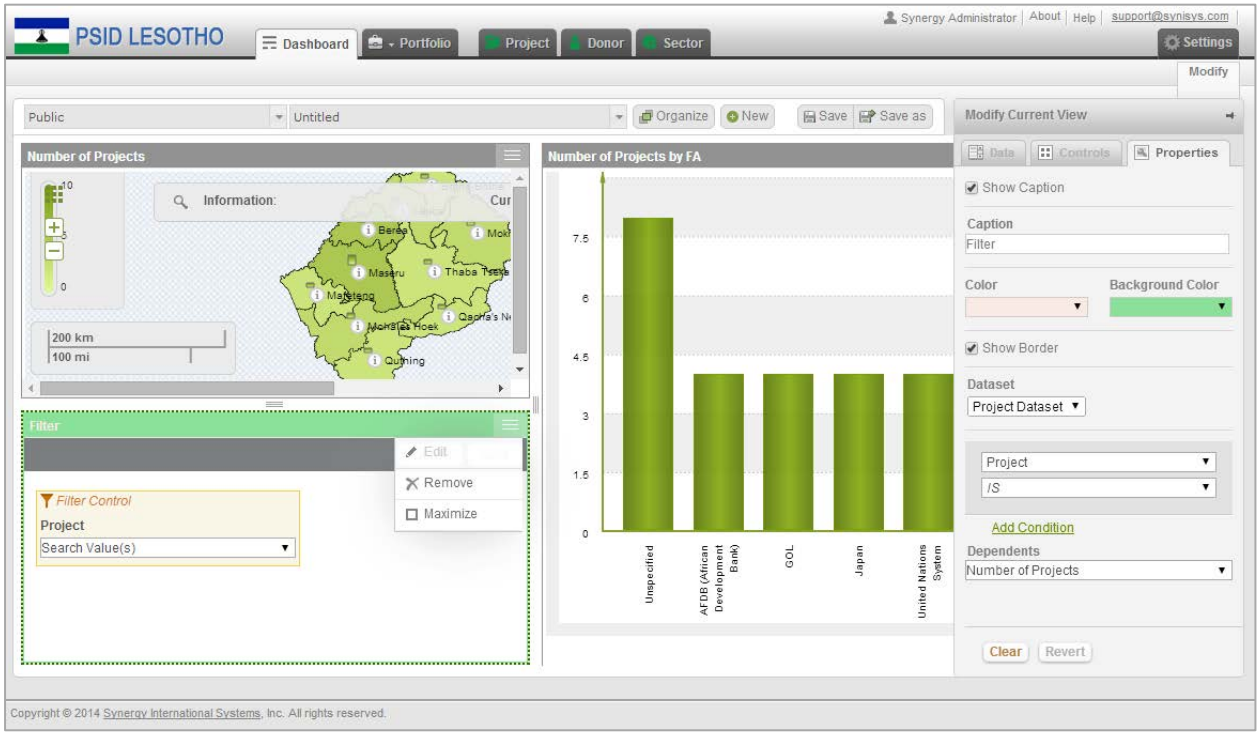


Figure 12: Setting the Filtering Control Properties

6. PORTFOLIO SECTION

In the *Portfolio* section of the *PSID Lesotho* application (Figure 13), you can make use of a personal worksite, designed for you to have a central place to view and manage your content, i.e. the projects and activities that you are in charge of or have access to. The content of this section is live content, generated specifically for each user that is logged in and is determined by what users have access to.

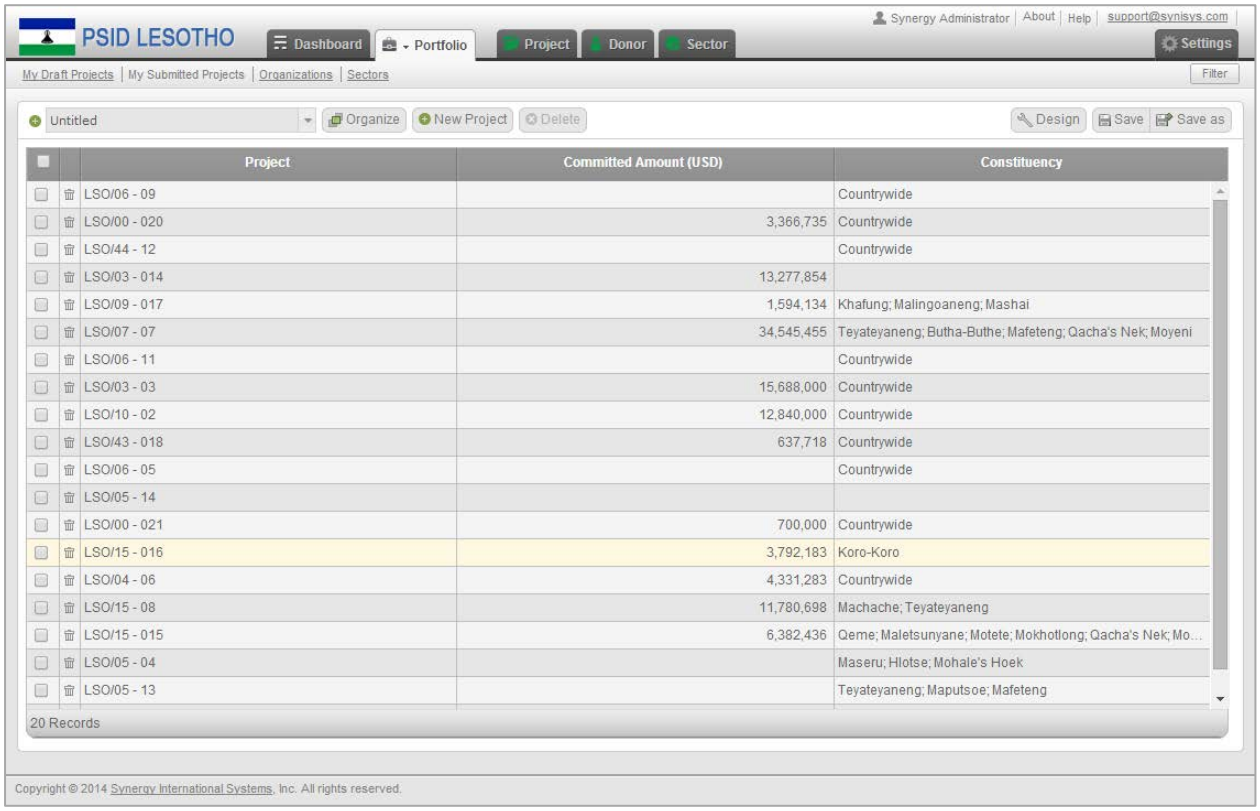


Figure 13: Portfolio Section

The *Portfolio* section in *PSID Lesotho* consists of four sub-sections, which are:

- **My Draft Projects** - this sub-section lists the draft projects that the user has created or the ones that the user has been granted with permissions to manage.
- **My Submitted Projects** - this sub-section lists the submitted projects that the user has created or the ones that the user has been granted with permissions to manage.
- **Organizations** - this sub-section lists the organizations that the user has been granted with permissions to manage.
- **Sectors** - this sub-section lists the sectors that the user has been granted with permissions to manage.

6.1 Accessing the Portfolio Section

To access the *Portfolio* section, click the **Portfolio** tab in the *PSID Lesotho* header. You will be navigated to the *Portfolio* section (Figure 13).

In the *Portfolio* section, you can view the data organized according to the selected columns, modify the currently used list, save it as a pre-defined report, include it under a definite

group, etc. Moreover, you can add new dataset instances (e.g. project, sector, etc.), edit and delete the existing ones.

Also, you can personalize the *Portfolio* section by designing exactly the view that you want to display to you when you access the section. For more details, see Personalizing the Portfolio List.

6.2 Personalizing the Portfolio List

It is possible to modify the list that is currently displayed in the *Portfolio* section. You can add new columns to it or remove the selected ones, rename them, etc. Moreover, you can assign certain properties to each of the components selected for the list.

To personalize the list in the *Portfolio* section, follow the steps below:

1. Click the Design **(Design)** button in the main toolbar to switch to the *Design* mode. The *Modify Current View* panel will appear (Figure 14).

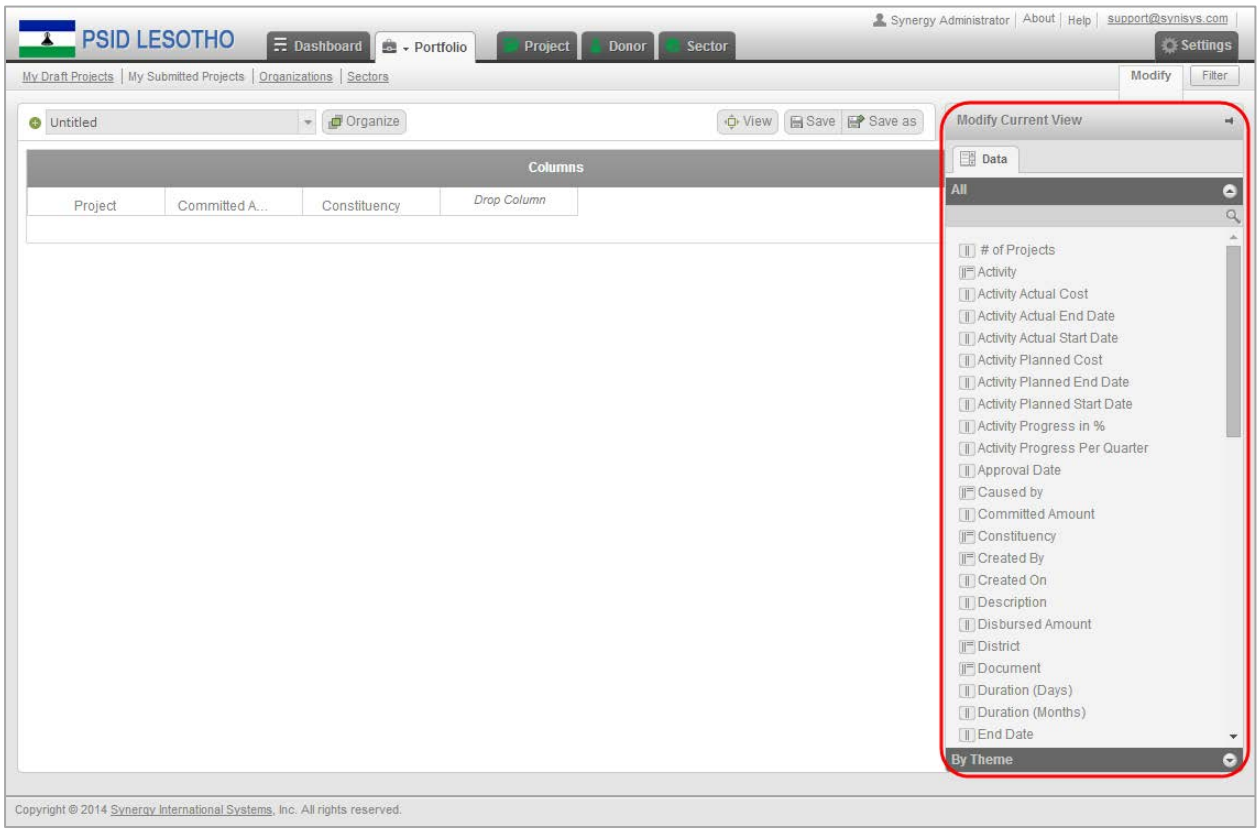


Figure 14: Modifying the Portfolio List

2. Add / remove columns selected for the *Portfolio* list in the *Data* tab.
3. Assign different properties to them, e.g. specify a different caption for the column, set its width, define a sorting order for it, etc. in the *Properties* tab.
4. Switch to the *View* mode to see the changes in effect by pressing the View **(View)** button in the main toolbar.

6.2.1 Adding the Portfolio List Columns

To add a column to the list, follow the steps below:

1. In the *Data* tab of the *Modify Current View* panel, select a category or field that you want to add to the list and drag it onto the column where you want the selected component to display.
2. Hold the left mouse button until a green tick appears on the selected component.
3. Release the mouse button.

6.2.2 Removing the Portfolio List Columns

To remove a column selected for the list, follow the steps below:

1. Select the column that needs to be removed from the list.
2. Hover the mouse pointer upon the selected column.
3. Click the **(Remove)** button that appears next to the selected component. The selected column will be removed from the list.

Note: The *Project* column cannot be removed.

6.2.3 Assigning Properties to the Portfolio List Columns

To assign certain properties to a list column, follow the steps below:

1. Select the column to which you want to assign different properties.
2. Switch to the *Properties* tab of the *Modify Current View* panel.
3. Assign properties to the selected column as appropriate.

6.3 Managing Projects

The projects that are recorded in the *PSID Lesotho* application can be viewed either in *My Draft Projects* or *My Submitted Projects* sub-sections in the *Portfolio* section. The *My Draft Projects* sub-section lists the projects that are missing vital information to be verified and submitted. On the other hand, the *My Submitted Projects* sub-section lists the projects that have passed the verification process and have been submitted.

This chapter outlines how you can manage projects in the *Portfolio* section, i.e. how you can add, view, edit, submit, and delete projects.

6.3.1 Adding a New Project

In the *Portfolio* section, you may add projects if you have been assigned with appropriate permissions.

To add a new project from the *Portfolio* section, follow the steps below:

1. Click the **Portfolio** tab in the *PSID Lesotho* application header (Figure 13).
2. Go to the **My Draft Projects** or **My Submitted Projects** sub-section (Figure 15).
3. Click the **New Project** button in the main toolbar (Figure 15). This will open the *Add Project* form which is described in the *PSID Lesotho Project Application User Manual* in REFERENCES.

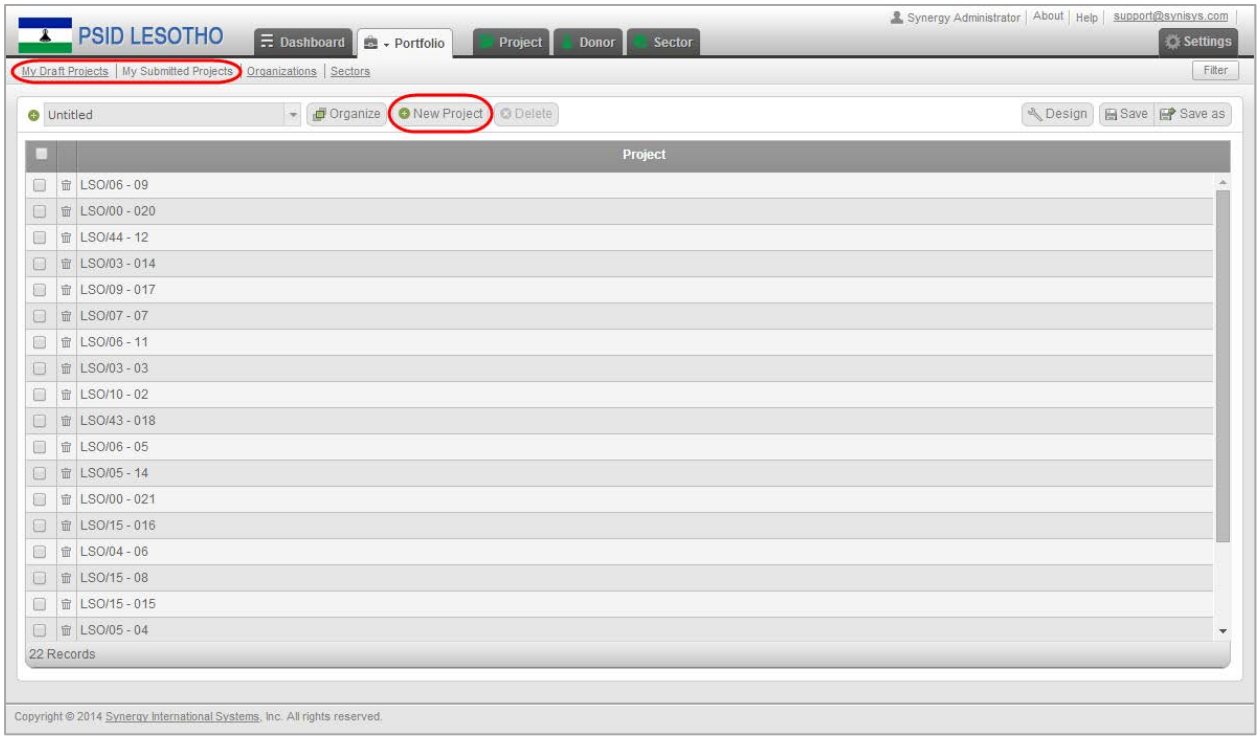


Figure 15: Creating a New Project in the Portfolio Section

6.3.2 Viewing Project Details

To view the details of a project listed in the *Portfolio* section, follow the steps below:

1. Click the **Portfolio** tab in the *PSID Lesotho* header (Figure 13).
2. Go to the **My Draft Projects** or **My Submitted Projects** sub-section.
3. Click the project that you want to view. The actions menu will appear (Figure 16).
4. Select the **View Project** option from the actions menu. You will be directed to the *Details* section of the application. For more information on how you can manage the project details, see DETAILS SECTION.

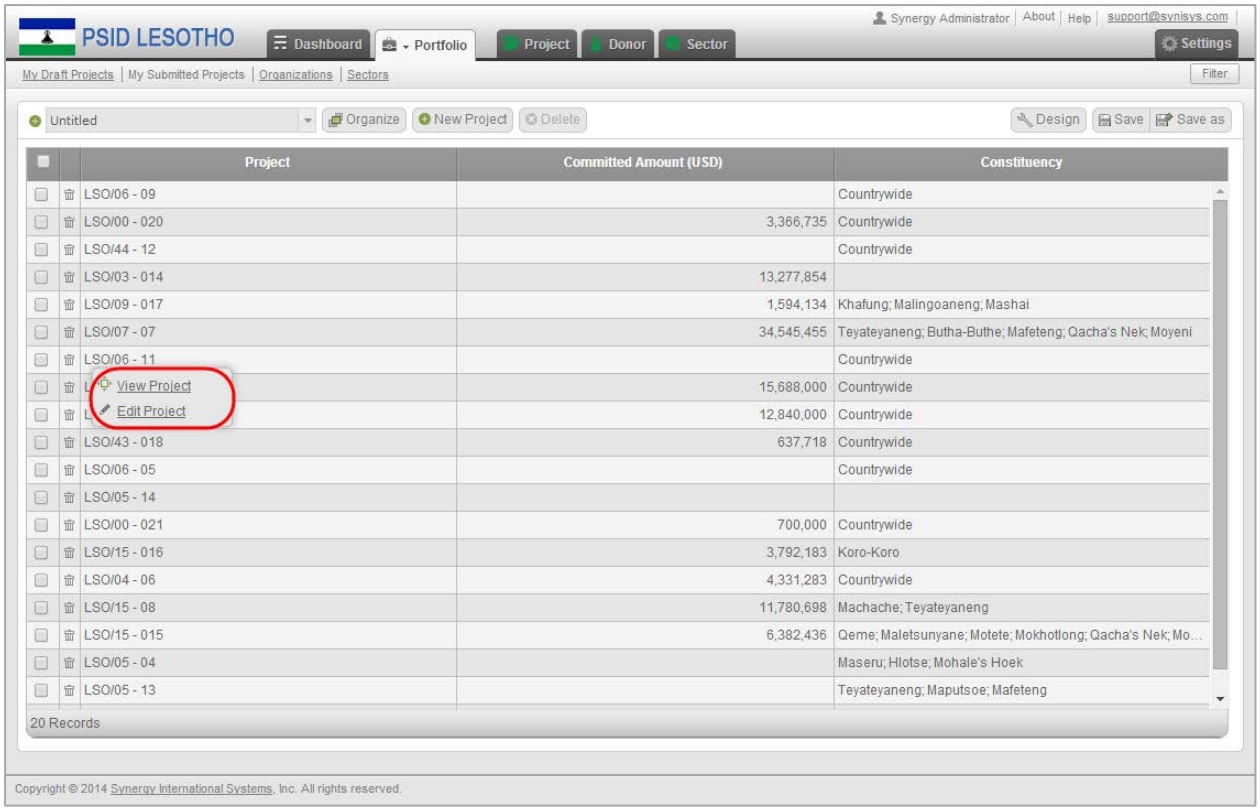


Figure 16: Viewing Project Details in the Portfolio Section

6.3.3 Editing Project Details

In the *Portfolio* section, you may edit projects if you have been assigned with appropriate permissions.

To edit a project in the *Portfolio* section, follow the steps below:

1. Click the **Portfolio** tab in the *PSID Lesotho* application header (Figure 13).
2. Go to the **My Draft Projects** or **My Submitted Projects** sub-section.
3. Click the project that you want to edit. The actions menu will appear (Figure 16).
4. Select the **Edit Project** option from the actions menu. This will open the *Edit Project* form which is described in the *PSID Lesotho Project Application User Manual* in REFERENCES.

6.3.4 Submitting Draft Projects

All projects in *PSID Lesotho* have to go through a definite workflow before they appear in the analytical modules of the application and can be included into reports. So, when a project is created, it is first saved as a draft in the *My Draft Projects* sub-section. Drafts can be reviewed and edited by the author and other users who have access to it.

Once the draft is final and all the mandatory fields are filled in the project form, it becomes ready for submission. Submitted projects are listed in the *My Submitted Projects* sub-section and are available for analysis and reporting.

To submit a draft project in the *Portfolio* section, follow the steps below:

1. Click the **Portfolio** tab in the *PSID Lesotho* application header (Figure 13).
2. Go to the **My Draft Projects** sub-section.
3. Select the draft project that you want to submit by ticking the checkbox to the left of the project record.
   Note: You may select multiple checkboxes for simultaneous submission of several projects.
4. Click the **Submit** button that appears in the main toolbar (Figure 17). The selected draft project will be moved to the *My Submitted Projects* sub-section.

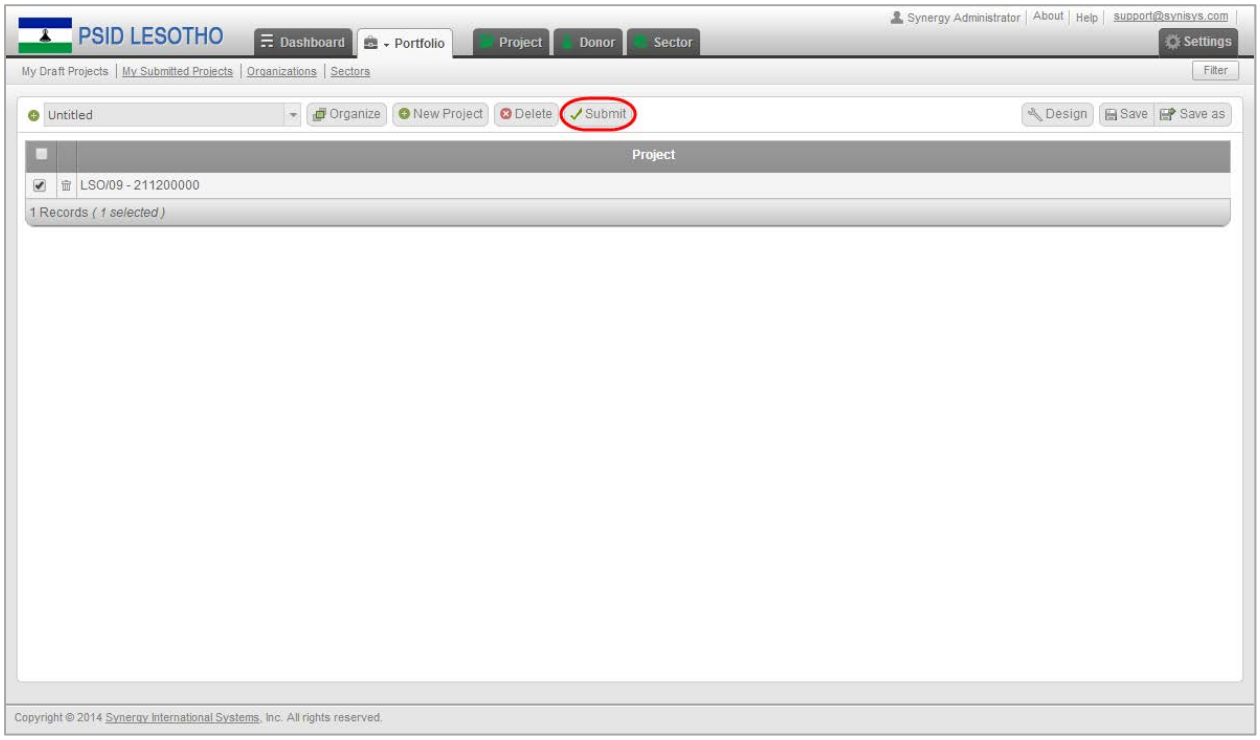


Figure 17: Submit Button for Draft Projects of the Portfolio Section

6.3.5 Deleting Projects

In the *Portfolio* section, you may delete projects if you have been assigned with appropriate permissions.

To delete a project from the *Portfolio* section, follow the steps below:

1. Click the **Portfolio** tab in the *PSID Lesotho* application header (Figure 13).
2. Go to the **My Draft Projects** or **My Submitted Projects** sub-section.
3. Click the **(Delete)** icon to the left of the project record that needs to be deleted (Figure 18). Please note that you may also delete a project by ticking the checkbox to the left of the project and clicking the **Delete** button that appears in the main toolbar (Figure 18). The latter option is useful when you intend to simultaneously delete several project records.

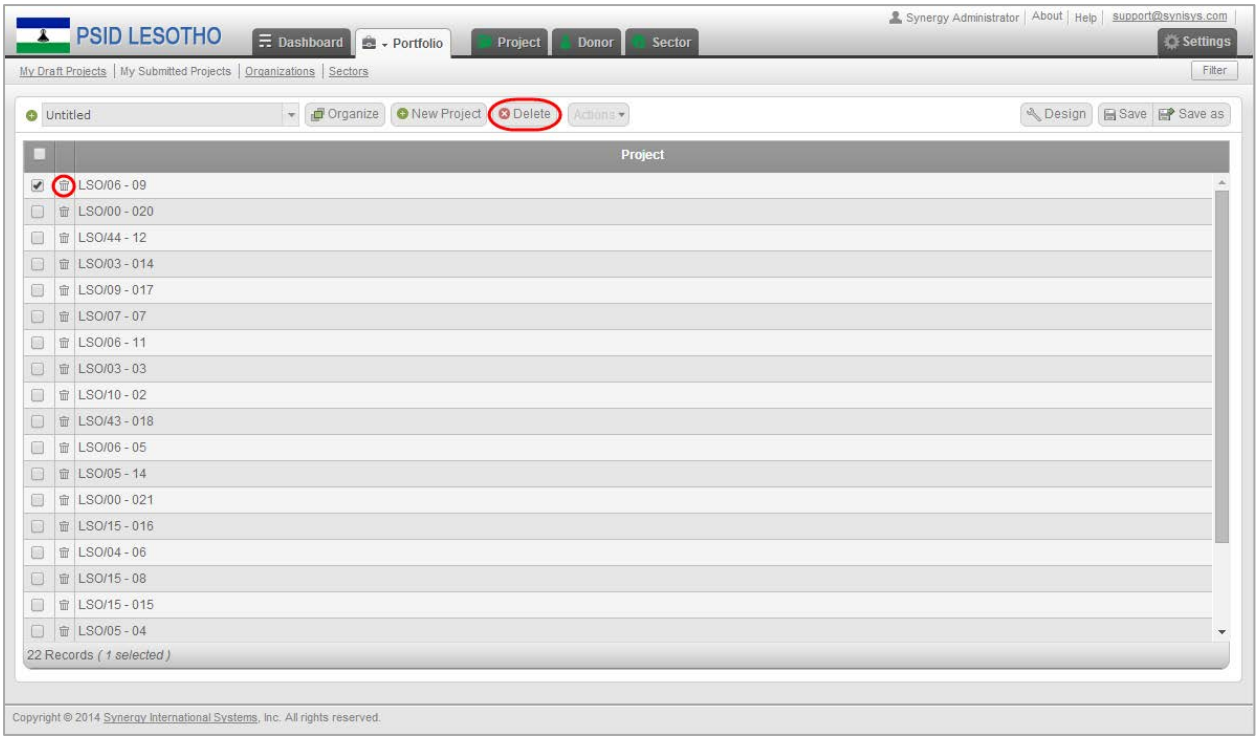


Figure 18: Deleting a Project in the Portfolio Section

6.4 Managing Organizations

This chapter outlines how to add, edit, view, and delete organizations that participate in the project implementation in the capacity of originators of funds.

6.4.1 Adding a New Organization

In the *Portfolio* section, you may add organizations if you have been assigned with appropriate permissions.

To add a new organization from the *Portfolio* section, follow the steps below:

1. Click the **Portfolio** tab in the *PSID Lesotho* application header (Figure 13).
2. Go to the **Organizations** sub-section (Figure 19).
4. Click the **New Donor** button in the main toolbar (Figure 19). This will open the *Add Organization* form which is described in the *PSID Lesotho Donor Application User Manual* in REFERENCES.

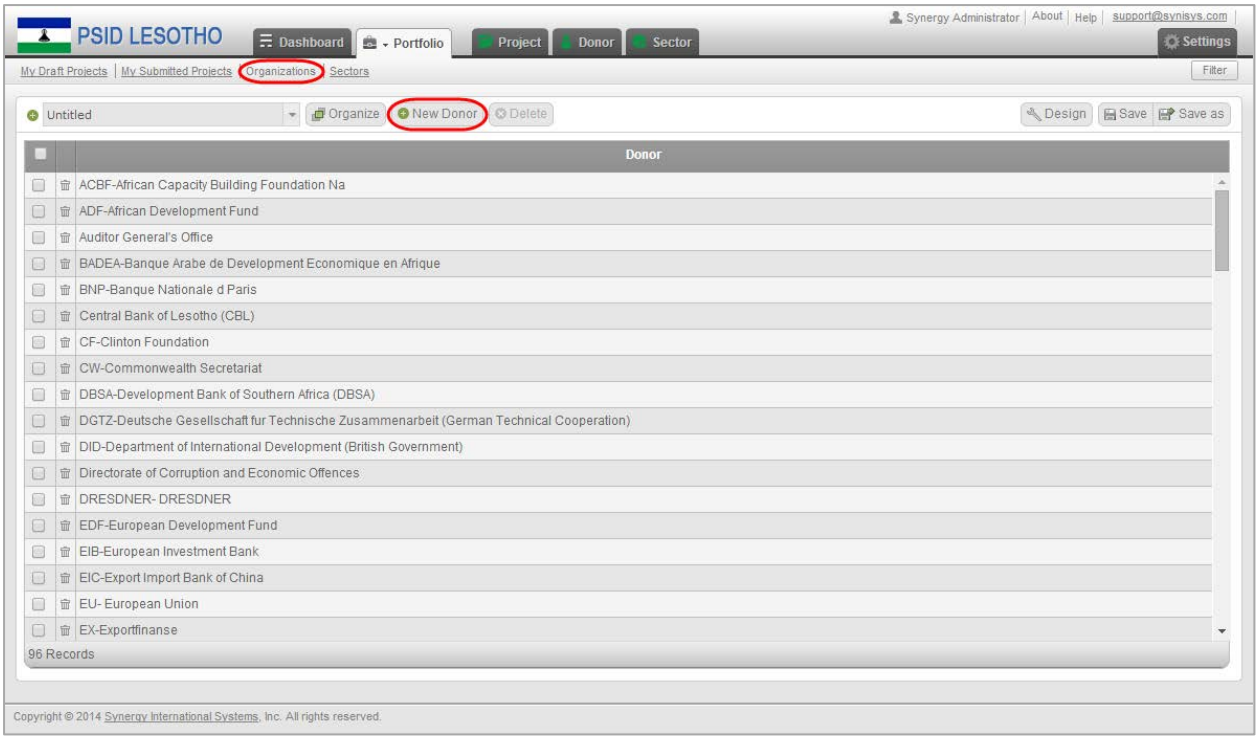


Figure 19: Creating a New Organization in the Portfolio Section

6.4.2 Editing Organization Details

In the *Portfolio* section, you may edit organizations if you have been assigned with appropriate permissions.

To edit an organization in the *Portfolio* section, follow the steps below:

1. Click the **Portfolio** tab in the *PSID Lesotho* application header (Figure 13).
2. Go to the **Organizations** sub-section (Figure 19).
3. Click the organization that you want to edit. The actions menu will appear (Figure 20).
4. Select the **Edit Organization** option from the actions menu. This will open the *Edit Organization* form which is described in the *PSID Lesotho Donor Application User Manual* in REFERENCES.

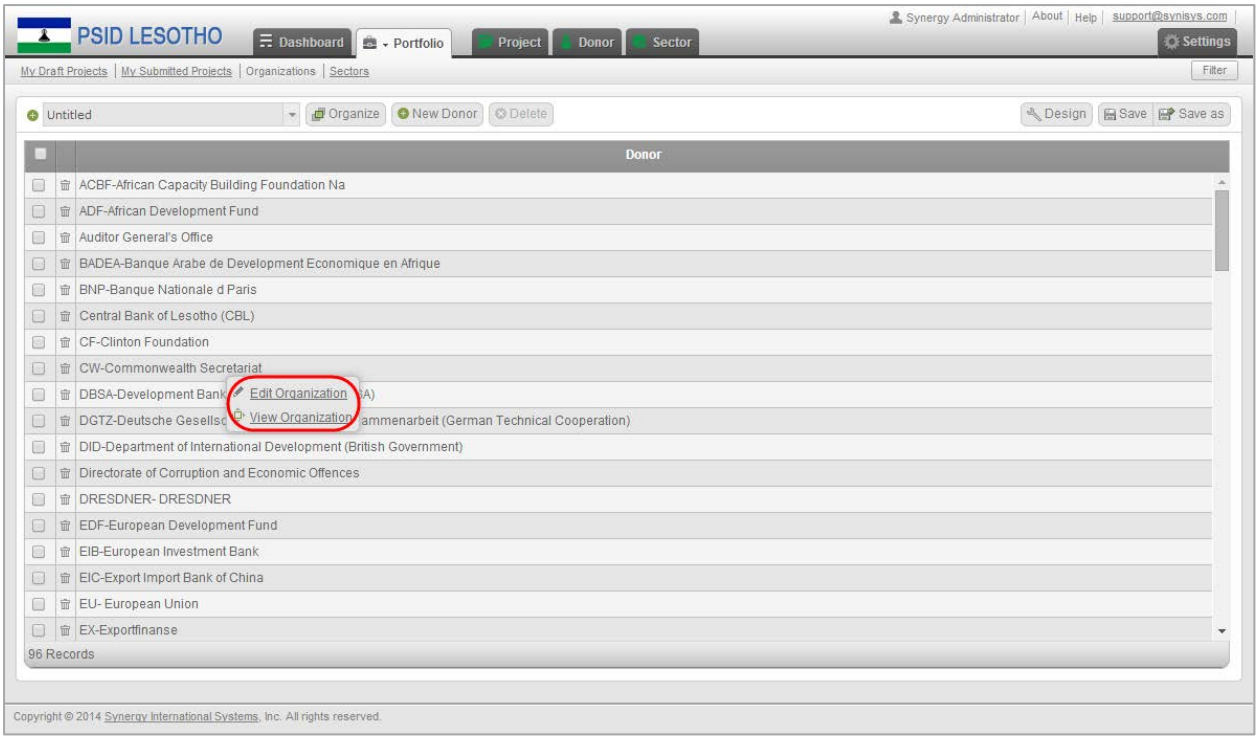


Figure 20: Editing Organization Details in the Portfolio Section

6.4.3 Viewing Organization Details

To view the details of an organization listed in the *Portfolio* section, follow the steps below:

1. Click the **Portfolio** tab in the *PSID Lesotho* header (Figure 13).
2. Go to the **Organizations** sub-section (Figure 19).
3. Click the organization the details of which you want to view. The actions menu will appear (Figure 20).
4. Select the **View Organization** option from the actions menu. You will be directed to the *Details* section of the application. For more information on how you can manage the organization details, see DETAILS SECTION.

6.4.4 Deleting Organizations

In the *Portfolio* section, you may delete organizations if you have been assigned with appropriate permissions.

To delete an organization from the *Portfolio* section, follow the steps below:

1. Click the **Portfolio** tab in the *PSID Lesotho* application header (Figure 13).
2. Go to the **Organizations** sub-section (Figure 19).
3. Click the **(Delete)** icon to the left of the organization record that needs to be deleted (Figure 21). Please note that you may also delete an organization by ticking the checkbox to the left of the organization record and clicking the **Delete** button that appears in the main toolbar (Figure 21). The latter option is useful when you intend to simultaneously delete several organization records.

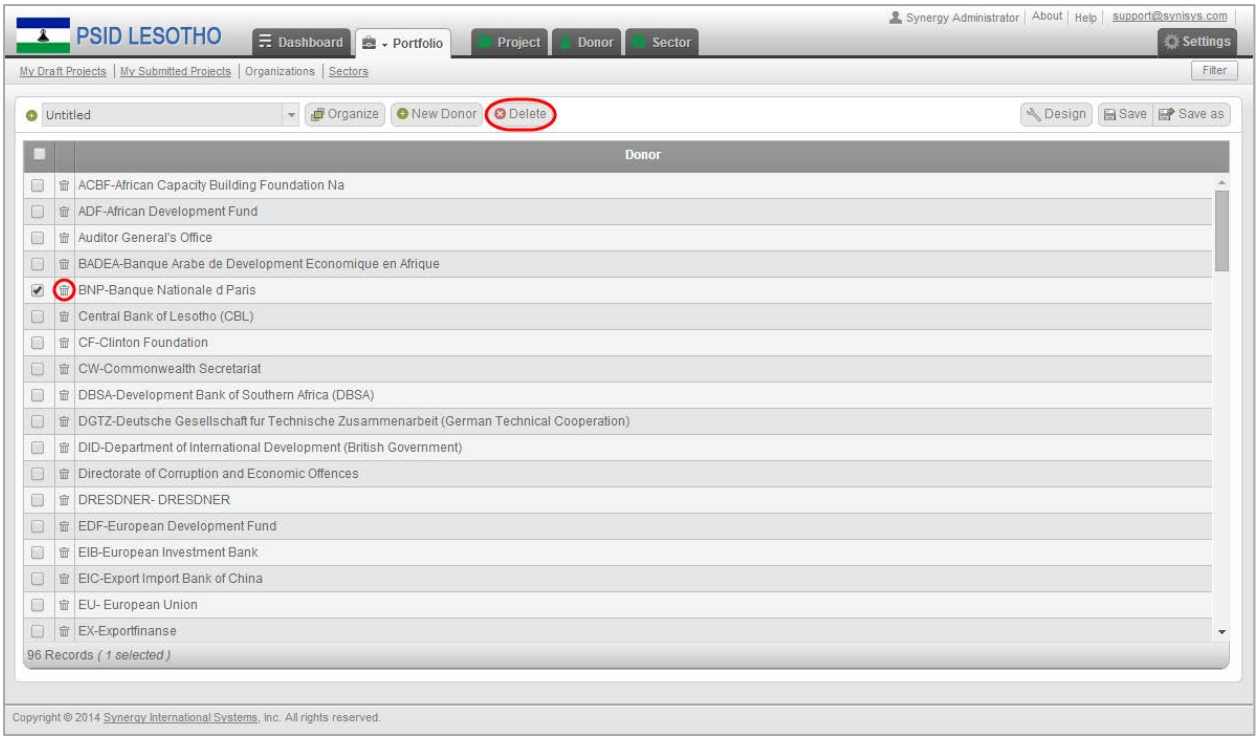


Figure 21: Deleting an Organization in the Portfolio Section

6.5 Managing Sectors

This chapter outlines how to add, edit, view, and delete the sectors of economy that the projects implemented in the country support.

6.5.1 Adding a New Sector

In the *Portfolio* section, you may add sectors if you have been assigned with appropriate permissions.

To add a new sector from the *Portfolio* section, follow the steps below:

1. Click the **Portfolio** tab in the *PSID Lesotho* application header (Figure 13).
2. Go to the **Sectors** sub-section (Figure 22).
3. Click the **New Sector** button in the main toolbar (Figure 22). This will open the *Add Sector* form which is described in the *PSID Lesotho Sector Application User Manual* in REFERENCES.

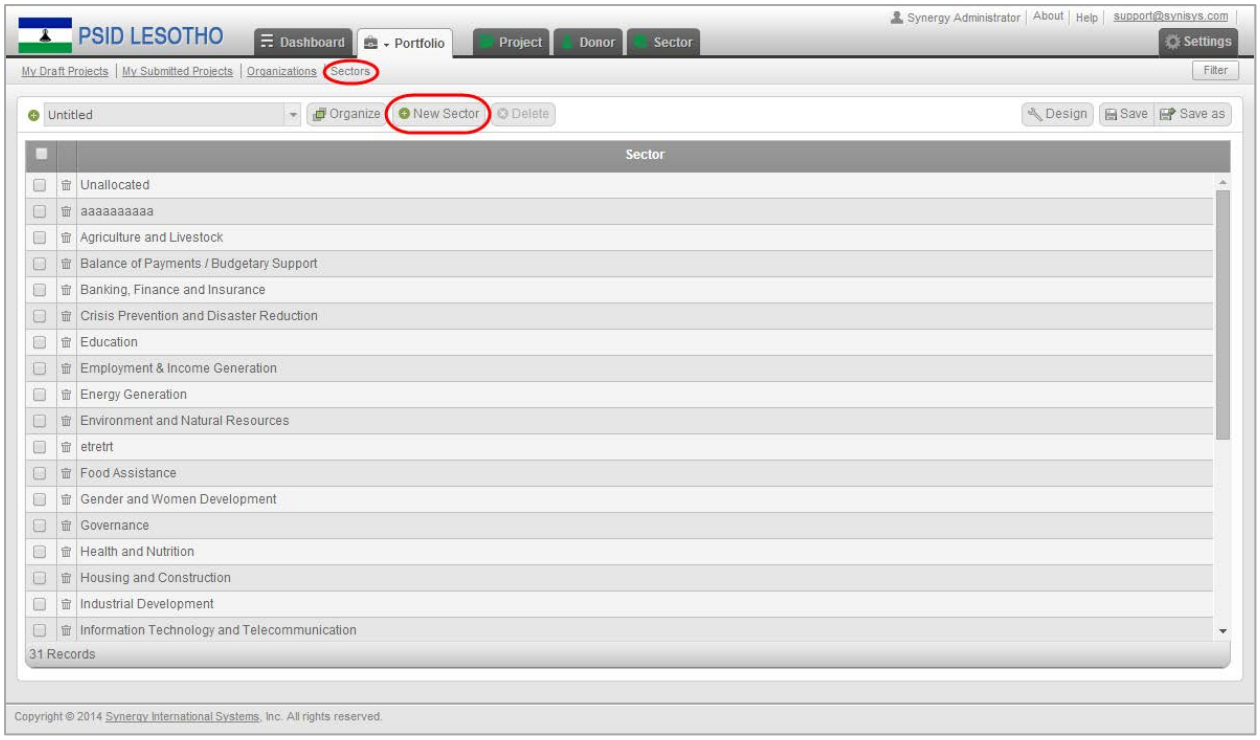


Figure 22: Creating a New Sector in the Portfolio Section

6.5.2 Editing Sector Details

In the *Portfolio* section, you may edit sectors if you have been assigned with appropriate permissions.

To edit a sector in the *Portfolio* section, follow the steps below:

1. Click the **Portfolio** tab in the *PSID Lesotho* application header (Figure 13).
2. Go to the **Sectors** sub-section (Figure 22).
3. Click the sector record that you want to edit. The actions menu will appear (Figure 23).
4. Select the **Edit Sector** option from the actions menu. This will open the *Edit Sector* form which is described in the *PSID Lesotho Sector Application User Manual* in REFERENCES.

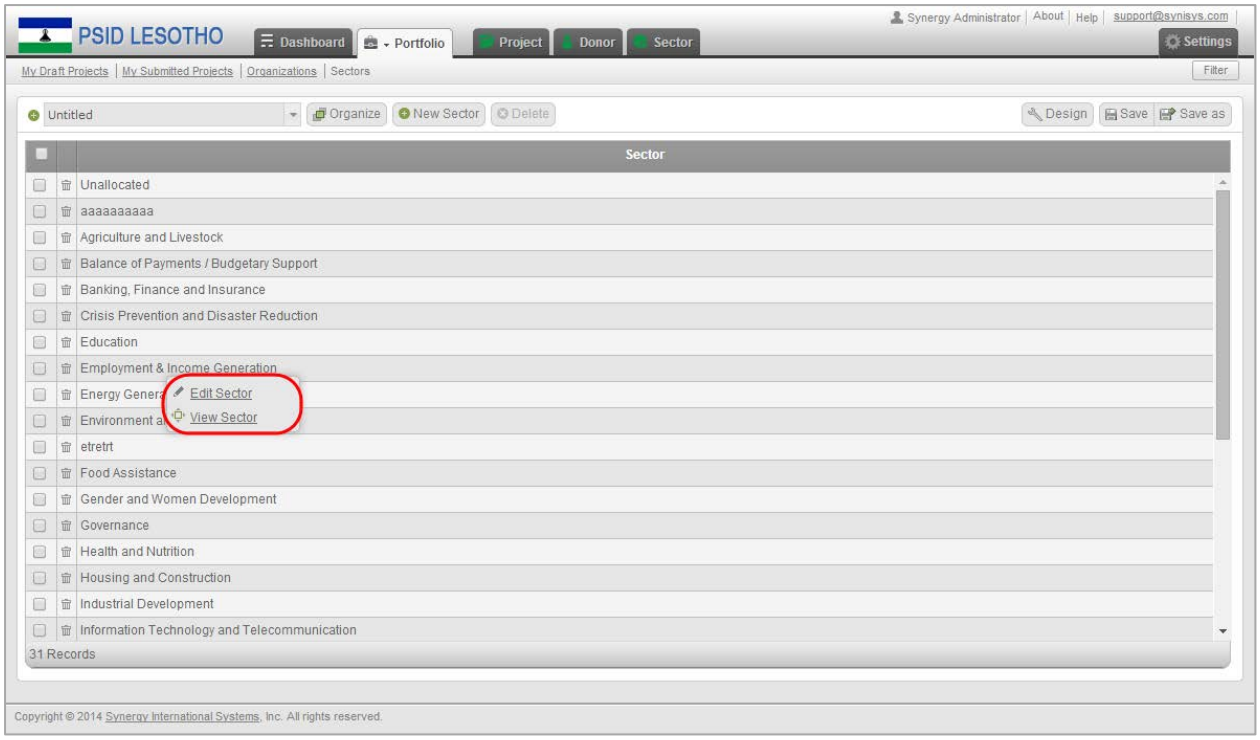


Figure 23: Editing Sector Details in the Portfolio Section

6.5.3 Viewing Sector Details

To view the details of a sector listed in the *Portfolio* section, follow the steps below:

1. Click the **Portfolio** tab in the *PSID Lesotho* header (Figure 13).
2. Go to the **Sectors** sub-section (Figure 22).
3. Click the sector that you want to view. The actions menu will appear (Figure 23).
4. Select the **View Sector** option from the actions menu. You will be directed to the *Details* section of the application. For more information on how you can manage the sector details, see DETAILS SECTION.

6.5.4 Deleting Sectors

In the *Portfolio* section, you may delete sectors if you have been assigned with appropriate permissions.

To delete a sector from the *Portfolio* section, follow the steps below:

1. Click the **Portfolio** tab in the *PSID Lesotho* application header (Figure 13).
2. Go to the **Sectors** sub-section (Figure 22).
3. Click the **(Delete)** icon to the left of the sector record that needs to be deleted (Figure 24). Please note that you may also delete a sector record by ticking the checkbox to the left of the record and clicking the **Delete** button that appears in the main toolbar (Figure 24). The latter option is useful when you intend to simultaneously delete several sector records.

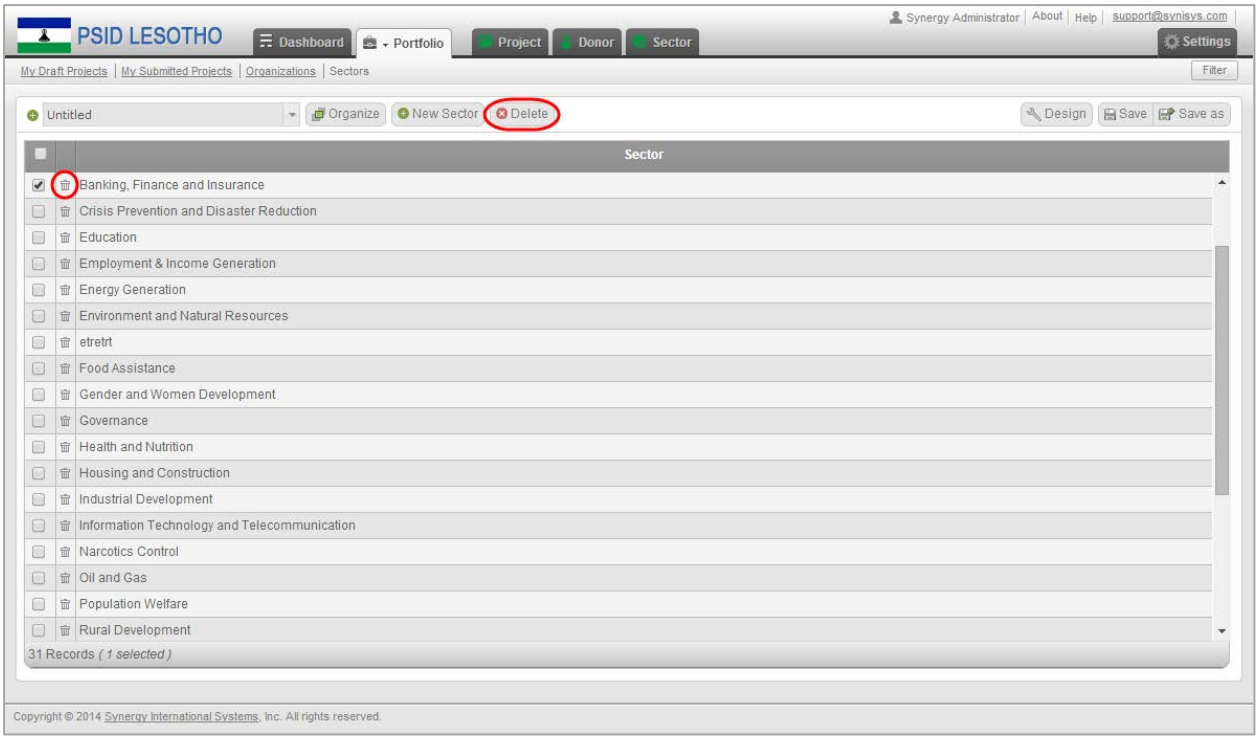


Figure 24: Deleting a Sector in the Portfolio Section

7. LIST MODULE

In the *List* module of the *PSID Lesotho* application (Figure 25), you can create and execute ad-hoc queries on the data and acquire results in the form of a list report.

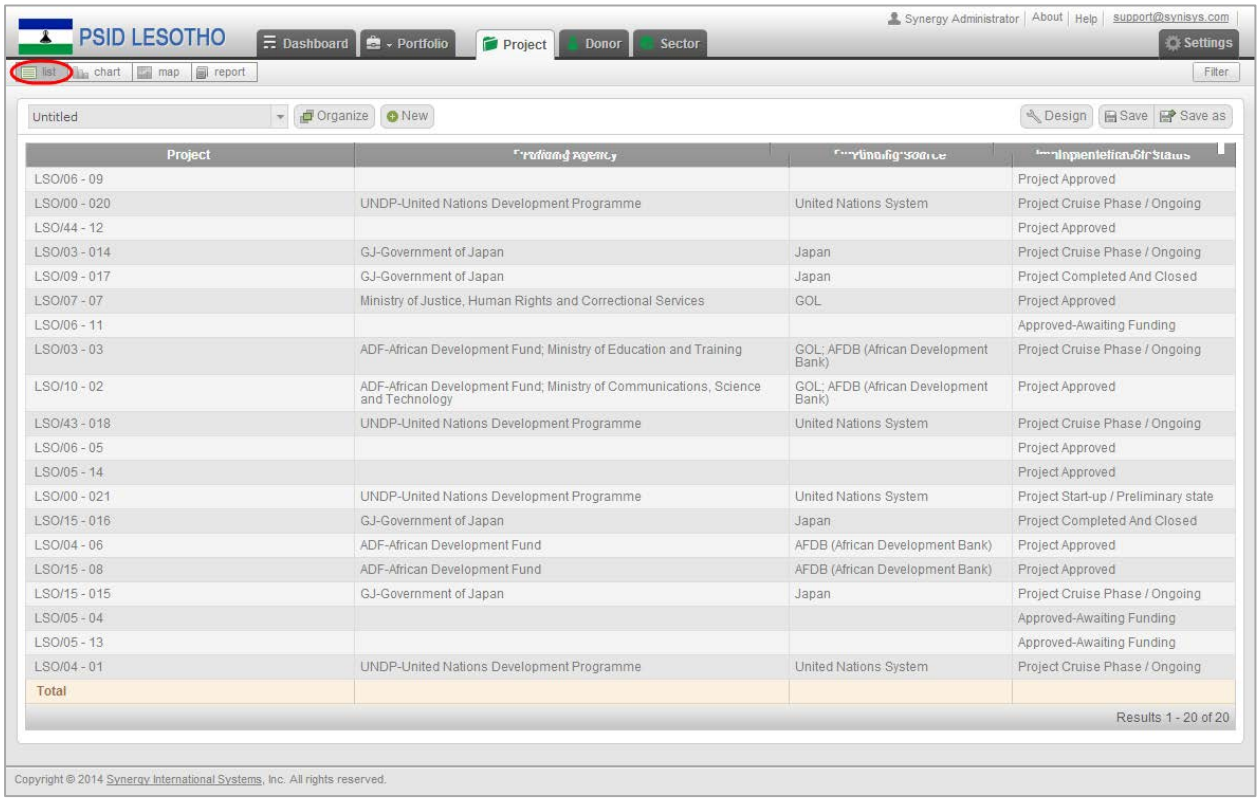


Figure 25: List Module

List reports are characterized by each record being represented with a set of rows and columns. The *List* module offers flexible options for grouping the records according to the available criteria (e.g. funding agency providing financial means for the project, sectors supported by the project etc.) Arranging list items in groups will help to see patterns and total up key amounts for comparison.

A basic list report consists of at least one group and one column, but the actual quantity of groups and columns is defined by the user's choice of view. For more details on how to define groups / columns for a list report, see Creating a List Report.

7.1 Accessing the List Module

To access the *List* module, go to **Dataset → List**. You will be navigated to the *List* module of the selected dataset (project, donor, or sector) in the *PSID Lesotho* application (Figure 25). In this module, you can view data organized according to the selected groups and columns, modify the currently used list, save it as a pre-defined report, include it under a definite group, etc.

7.2 Creating a List Report

In the *List* module, you can draw up list reports of different levels of complexity by selecting the categories and fields that will serve as groups, columns and column groupings for the report.

To create a list report, follow the steps below:

1. Go to the **List** module of the *Project/Donor/Sector* dataset in *PSID Lesotho*.
2. Click the Design **(Design)** button in the main toolbar to switch to the *Design* mode. The *Modify Current View* panel will appear (Figure 26).

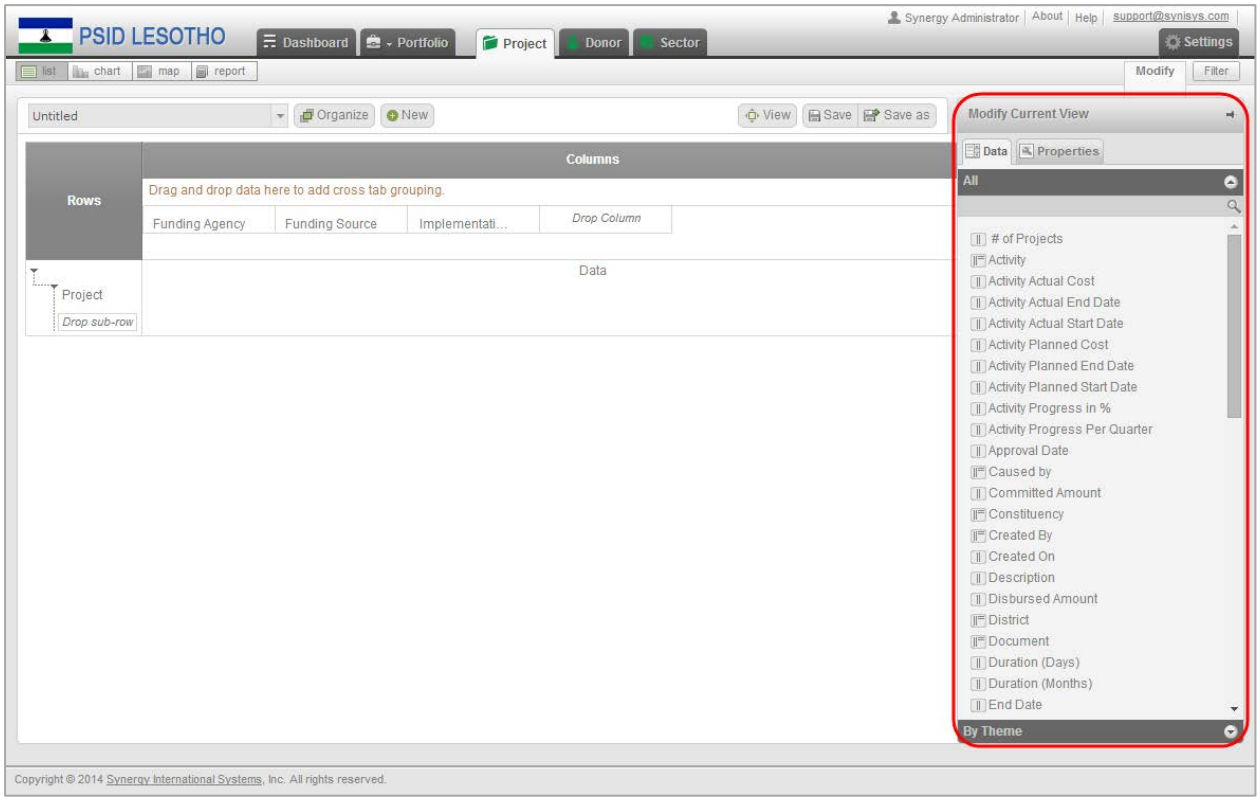


Figure 26: Creating a List Report

3. Add rows and columns to the list report.
4. Add cross tab groupings to the list report.
5. Assign properties to the selected report components.
6. Switch to the *View* mode to see the changes in effect by pressing the View **(View)** button in the main toolbar.

7.2.1 Adding Rows / Columns / Cross Tab Groupings

To add a row / column / cross tab grouping to the list report, follow the steps below:

1. In the *Data* tab, select a category or field that you want to add to a list report and drag it onto the space where you want the selected component to display.
   Note: You can select instances for the list report components browsing in the entire list of categories and fields in the *All* sub-tab. Or, you may do it in the *By Theme*

sub-tab where the categories and fields are grouped according to a common feature they share.

2. Hold the left mouse button until a green tick appears on the selected component.
3. Release the mouse button.

7.2.2 Assigning Properties to the List Components

To assign certain properties to a list component, follow the steps below:

1. Select the list component to which you want to assign properties.
2. Switch to the *Properties* tab of the *Modify Current View* panel.
3. Assign properties to the selected component as appropriate.

Note: You may assign different sets of properties to list components depending on the type of the component selected for the report.

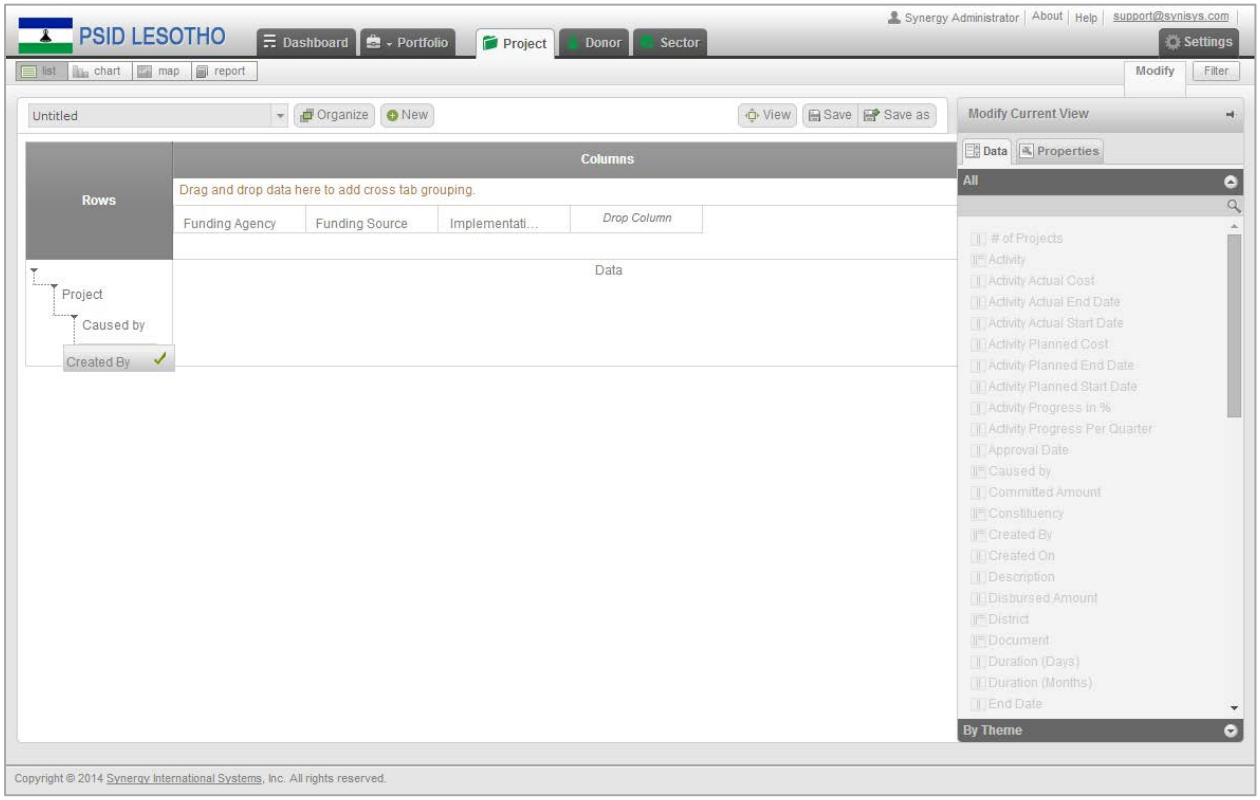


Figure 27: Adding a Row to the List Report

7.3 Modifying a List Report

At any time, you can modify the list report displayed to you in the *List* module.

To modify a list report, follow the steps below:

1. Click the Design **(Design)** button in the main toolbar to switch to the *Design* mode. The *Modify Current View* panel will appear (Figure 26).
2. Add new rows / columns / cross tab groupings for the list report. For more details, see Adding Rows / Columns / Cross Tab Groupings.
3. Re-order rows / columns / cross tab groupings selected for the report.

4. Remove rows / columns / cross tab groupings selected for the report.
5. Assign different properties to the selected report components. For more details, see Assigning Properties to the List Components.
6. Switch to the *View* mode to see the changes in effect by pressing the View **(View)** button in the main toolbar.

7.3.1 Removing Rows / Columns / Cross Tab Groupings

To remove a column selected for the list, follow the steps below:

1. Click the Design **(Design)** button in the main toolbar to switch to the *Design* mode. The *Modify Current View* panel will appear (Figure 26).
2. Select the row / column / cross tab grouping that needs to be removed from the list.
3. Hover the mouse pointer upon the selected component.
4. Click the **(Remove)** button that appears next to the component to remove it from the list.

7.3.2 Re-ordering List Components

To re-order list report components, i.e. change the order in which they appear in the report, follow the steps below:

1. Click the Design **(Design)** button in the main toolbar to switch to the *Design* mode. The *Modify Current View* panel will appear (Figure 26).
2. Select the list component for which you want to change the position.
3. Drag-and-drop it in the desired place.

7.4 Expanding the List Item

It is possible to expand the list item level to view the information of the sub-level(s). To expand the list item level, click the '+' sign next to the name of the list item. This will expand the list item group level displaying the first sub-level (Figure 28). This can further be expanded unless there are no more sub-levels to display.

Note: You can expand only one group level at a time. If you expand the group level of another list item, the previously expanded group level will get collapsed.

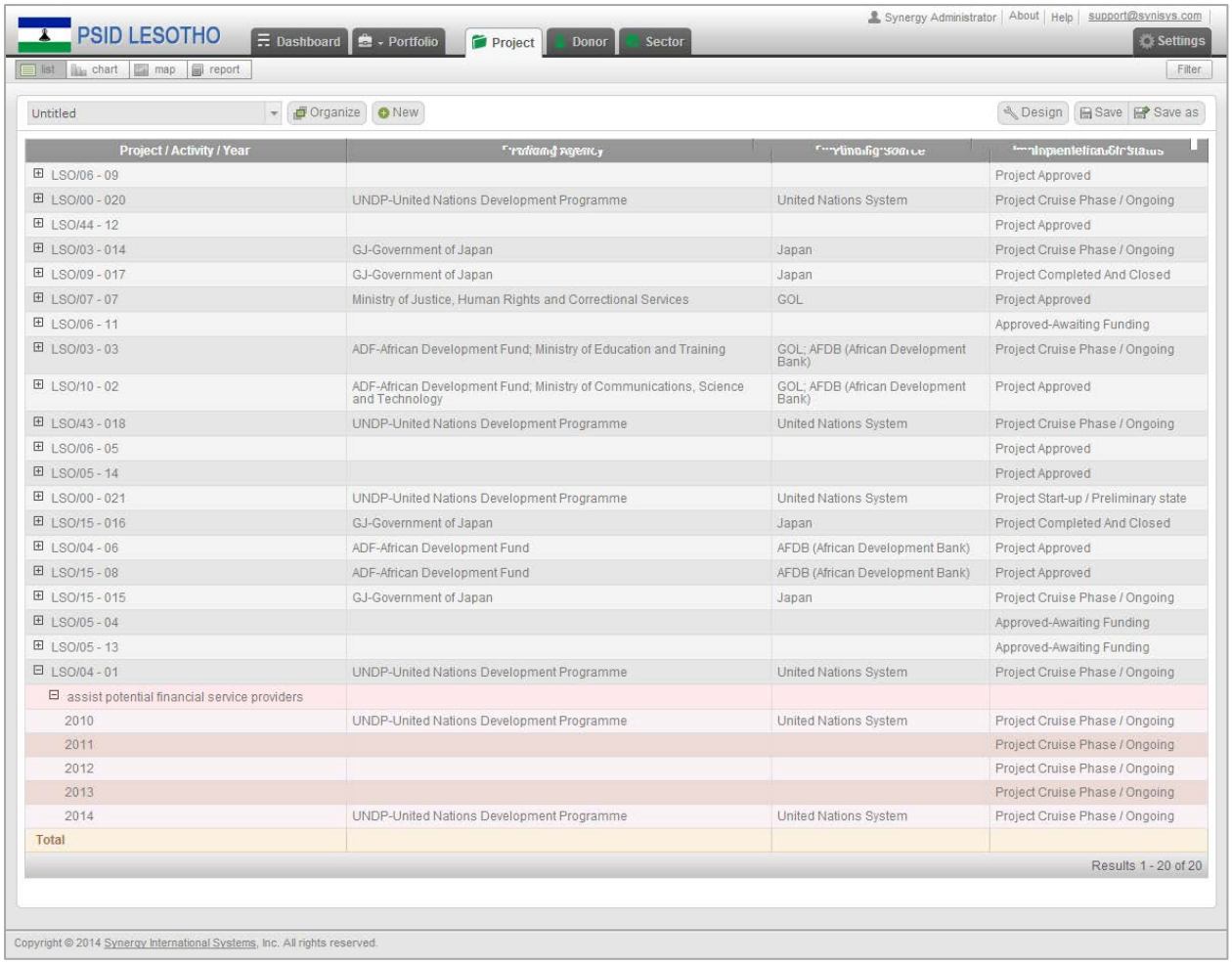


Figure 28: Expanding the List Item Level

7.5 Sorting List Items

Entries in the list report may be sorted by the column value. To achieve that, click the arrow in the column header (Figure 29). This will sort the list alphabetically or numerically depending on the type of data entered into that column. Clicking the arrow in the column header once again will sort the list items in reverse order.

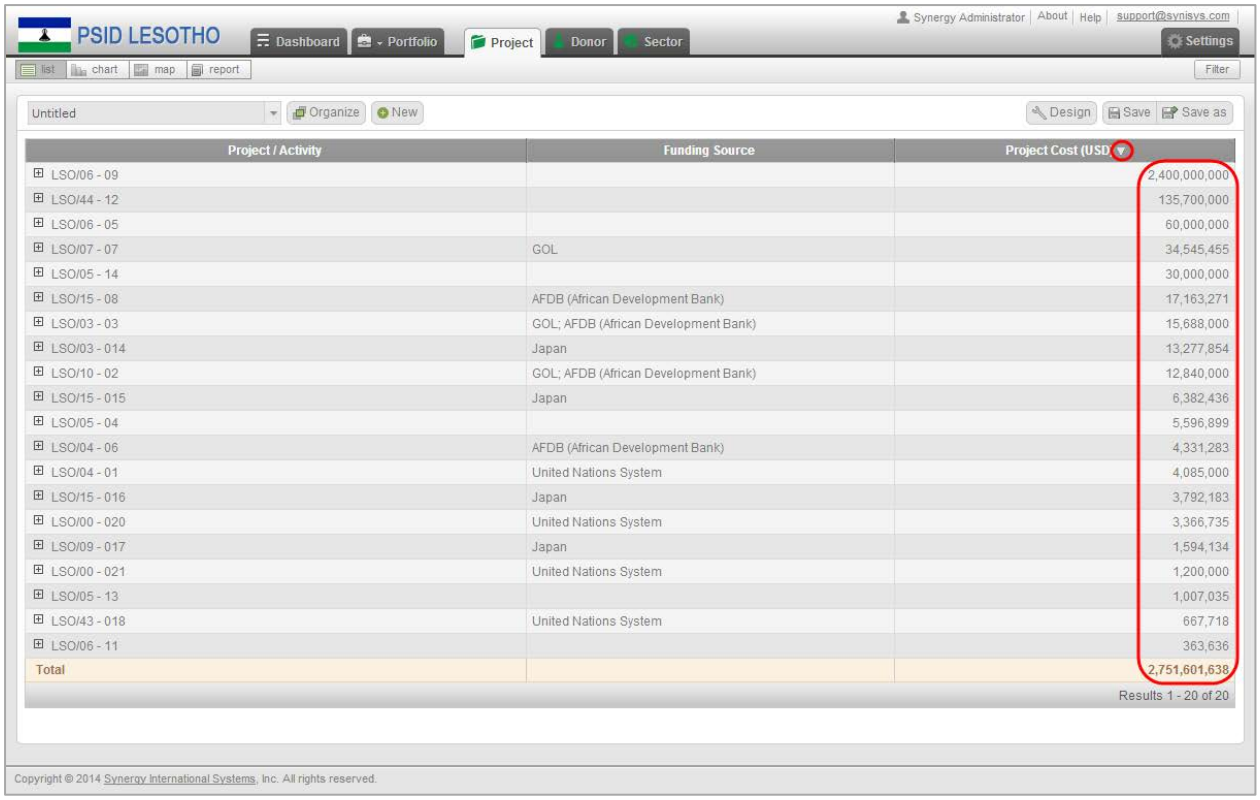


Figure 29: Sorting the List Items

7.6 Browsing among List Items

You can browse among the list items by clicking the number link of the page you want to navigate to. The **(First)**, **(Previous)**, **(Next)** and **(Last)** buttons are used to navigate back and forth through the pages.

7.7 Managing PSID Lesotho Datasets

The *PSID Lesotho* application provides you with the possibility of managing the datasets that exist in the application through its *List Report Designer*. The datasets that can be managed in the application include *Project*, *Donor*, and *Sector*.

Using the *List Report Designer,* you can view or edit the dataset instances. This chapter outlines how you can do it in more detail.

7.7.1 Viewing Dataset Instances

To be able to view dataset instances, follow the steps below:

1. Access the dataset the instances of which you want to view by selecting one of the following tabs - **Project**, **Donor**, or **Sector** – and navigating to the *List* module.
2. Create a report indicating the instance category as the row for the report. For more details on how to create list reports, see Creating a List Report.
3. In the report generated, click the dataset instance the details of which you want to view and select the **View** option from the actions menu that appears (Figure 30).

You will be directed to the DETAILS SECTION where the information of the selected instance will display.

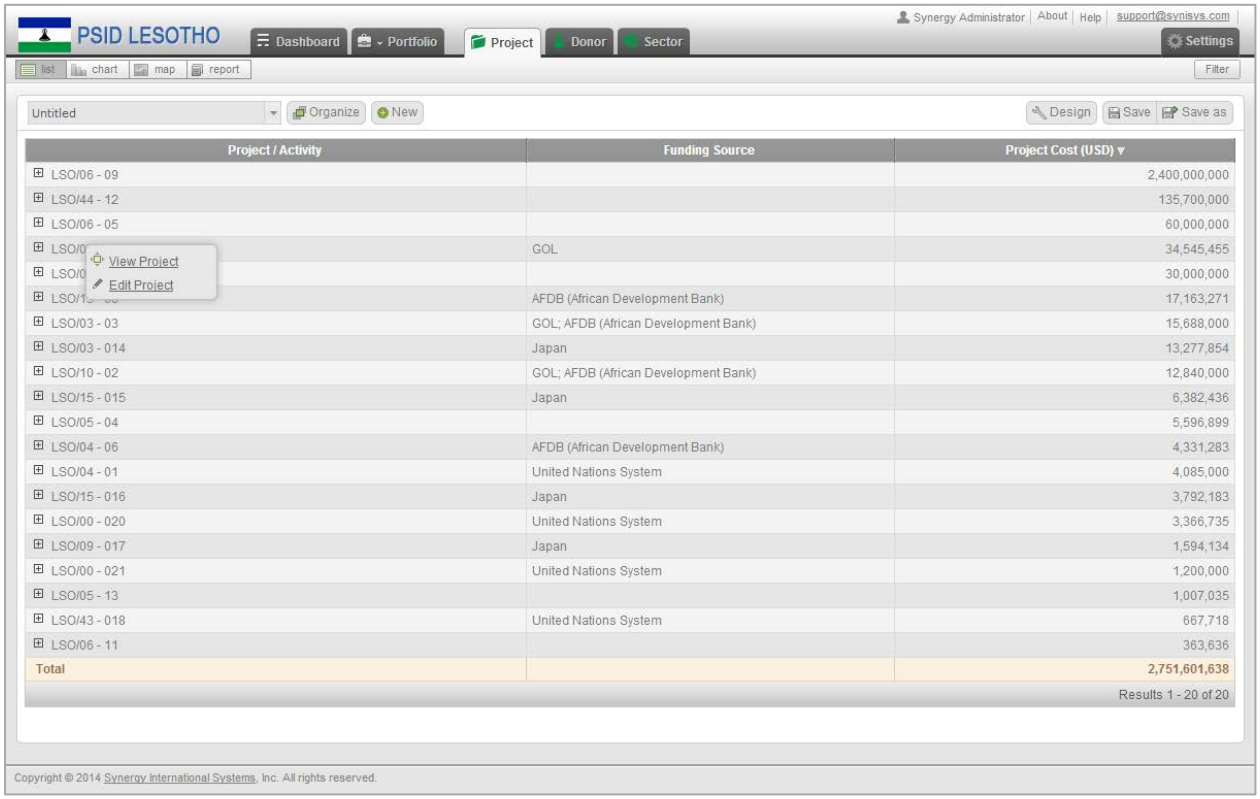


Figure 30: Managing Dataset Instances

7.7.2 Editing Dataset Instances

To be able to edit dataset instances, follow the steps below:

1. Access the dataset the instances of which you want to edit by selecting one of the following tabs - **Project**, **Donor**, or **Sector** – and navigating to the *List* module.
2. Create a report indicating the instance category as the row for the report. For more details on how to create list reports, see Creating a List Report.
3. In the report generated, click the dataset instance the details of which you want to edit and select the **Edit** option from the actions menu that appears (Figure 30). You will be directed to the *Data Entry* module of the selected dataset where the respective form will display. For a detailed description of the form, see the user manual if the corresponding application in REFERENCES.

8. CHART MODULE

The *PSID Lesotho* application is equipped with a powerful chart designer that empowers you with all necessary tools to create charts for professionally looking presentations and reports. A user-friendly interface, great number of visual effects and pre-defined chart types, flexible chart components selection, and on-screen real-time chart visualization make using the chart designer an easy and delightful experience.

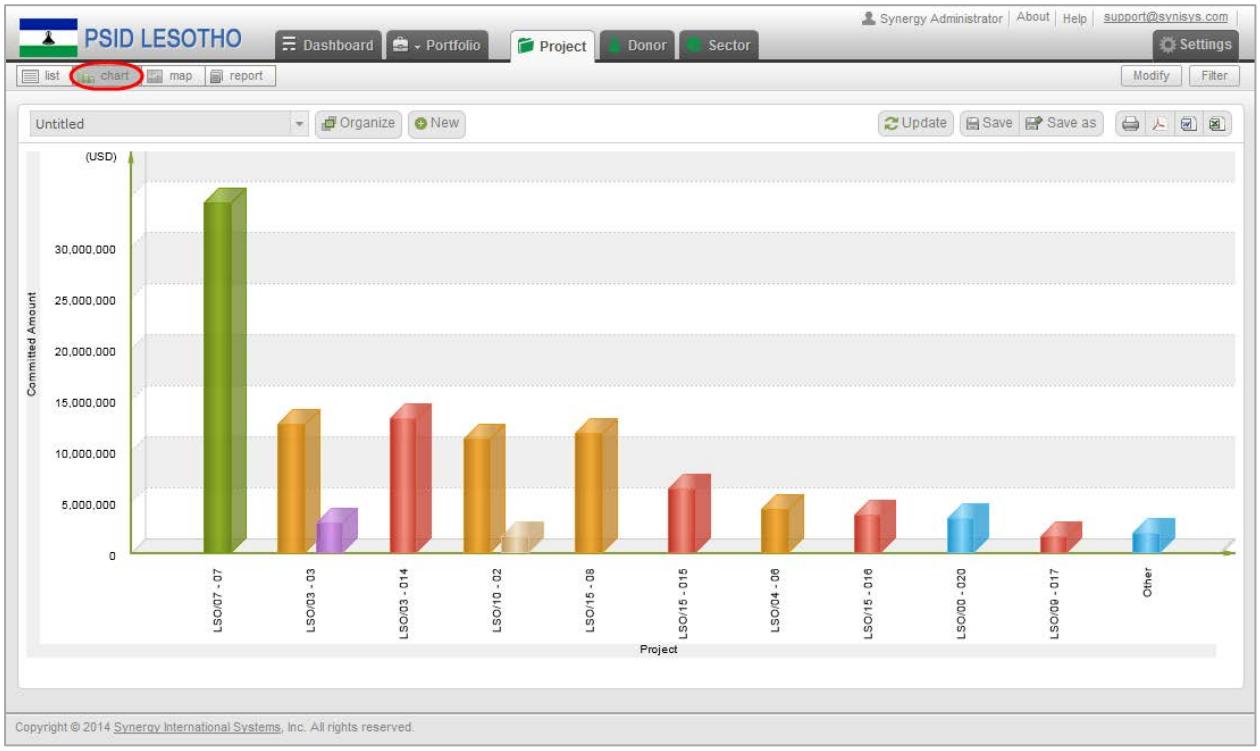


Figure 31: Chart Module

8.1 Accessing the Chart Module

To access the *Chart* module, go to **Dataset → Chart**. You will be navigated to the *Chart* module of the selected dataset (project, donor, or sector) in the *PSID Lesotho* application (Figure 31). In this module, you may create different types of chart reports for better data visualization and analysis. You can also save chart reports as pre-defined ones, include them under a definite group, etc.

8.2 Creating a Chart Report

To create a new chart, follow the steps below:

1. Go to the **Chart** module of the *Project/Donor/Sector* dataset in *PSID Lesotho*.
2. Click the **Modify** button in the reporting options bar. The *Modify Current View* panel will appear (Figure 32).
3. In the *Data* tab, select the data that will appear in the chart report. They will include the chart category, series, values, etc.

4. In the *Formatting* tab, define additional properties for the chart report. They will include selection of the maximal number of category items to be displayed on the chart, etc.
5. Click the **Update** button to generate a chart report according to the selections made.

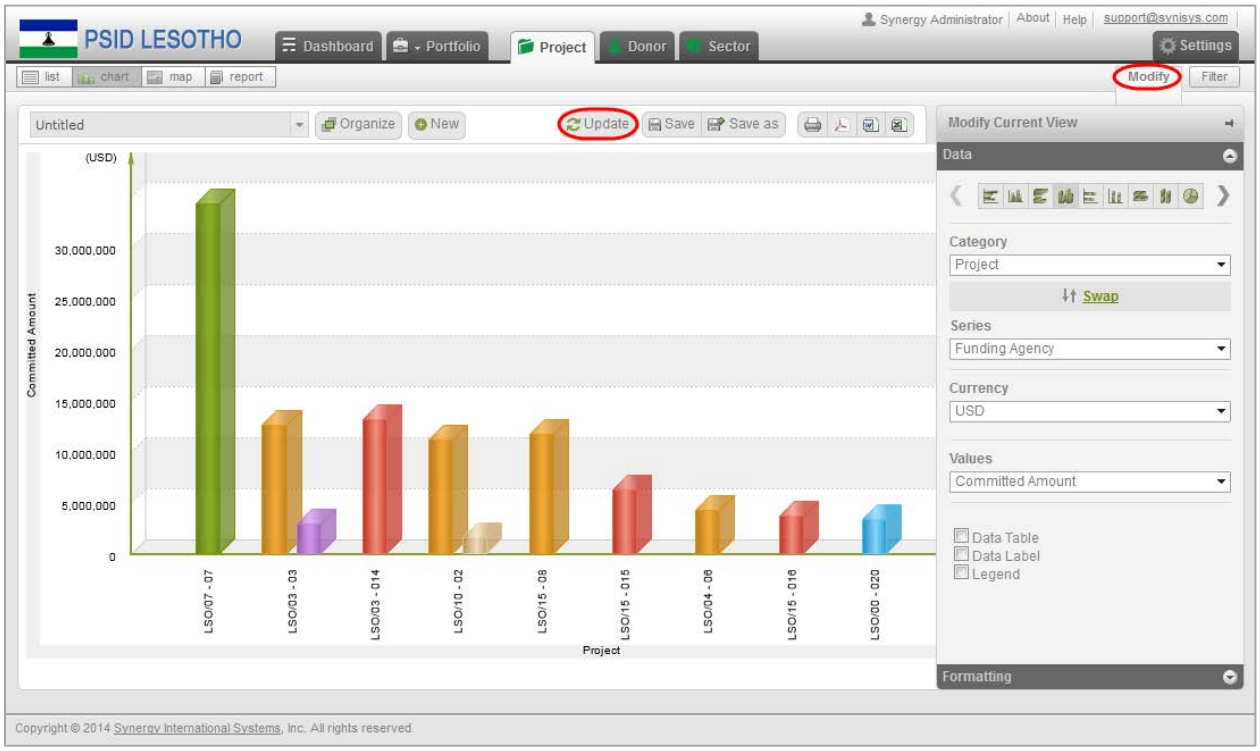


Figure 32: Creating a Chart Report

8.2.1 Defining Data for the Chart Report

To define what data should appear on the chart, follow the steps below:

1. Go to the **Data** tab in the *Modify Current View* panel (Figure 33).
2. Select the following options:

Data Field	Description
Chart Types	Allows defining the chart type. For the list of available chart types, see APPENDIX I: CHART TYPES.
Category	Allows selecting one of the options provided in the *Category* drop-down menu. The selected category will define one of the chart axes. **Note:** Selection of a category for the chart report is required.
Series	Allows selecting one of the options provided in the *Series* drop-down menu. The selected series will define the chart legend. **Note:** Selection of a series for the chart report is optional.
Currency	Allows defining the currency in which the chart values will be expressed.
Values	Allows selecting a value from the list that will define the

	main chart criteria.
Data Table	Presents the summary of the information contained in the chart in a grid or table.
Data Label	Shows the actual values of each chart constituent. This option is disabled if you have selected the pie chart type.
Legend	Explains the categories and data series displayed on the chart.

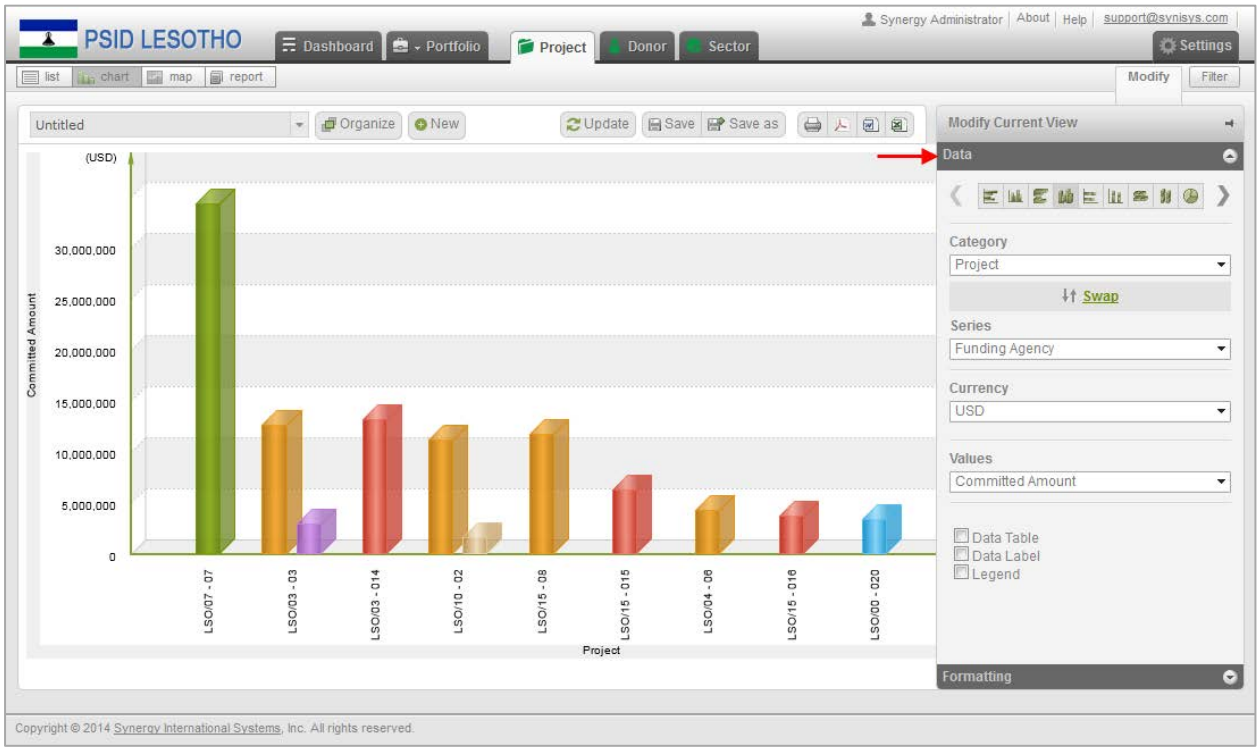


Figure 33: Defining Data for a Chart Report

8.2.2 Selecting Formatting Options for the Chart Report

To define formatting options for the chart report, follow the steps below:

1. Go to the **Formatting** tab in the *Modify Current View* panel (Figure 34).
2. Select the following options:

Formatting Field	Description
Char Count	Limits the number of characters to be used to display the category item names to the value set in this field.
Show Top <Number> Category	Indicates the maximal number of category items to be displayed in the chart.
Show Top <Number> Series	Indicates the maximal number of series items to be displayed in the chart.
Show in <Pattern>	Allows selecting a pattern-filled chart for black and white printing.
Show in <Number>	Allows defining how the numerals (e.g. project cost, etc.) should appear on the chart. The following options are available: *Original* (shows the numerals as it is recorded in

	the project documents), *Thousands* (shows the numerals divided by 1,000), *Millions* (shows the numerals divided by 1,000,000), and *Billions* (shows the numerals divided by 1,000,000,000).
Show Axes	Allows defining whether the horizontal and vertical axes should be shown on the chart report.
Secondary Axis	Allows defining whether the secondary axis should be shown on the chart report.
Category Axis	Allows entering text to go with the horizontal axis.
Values Axis	Allows entering text to go with the vertical axis.

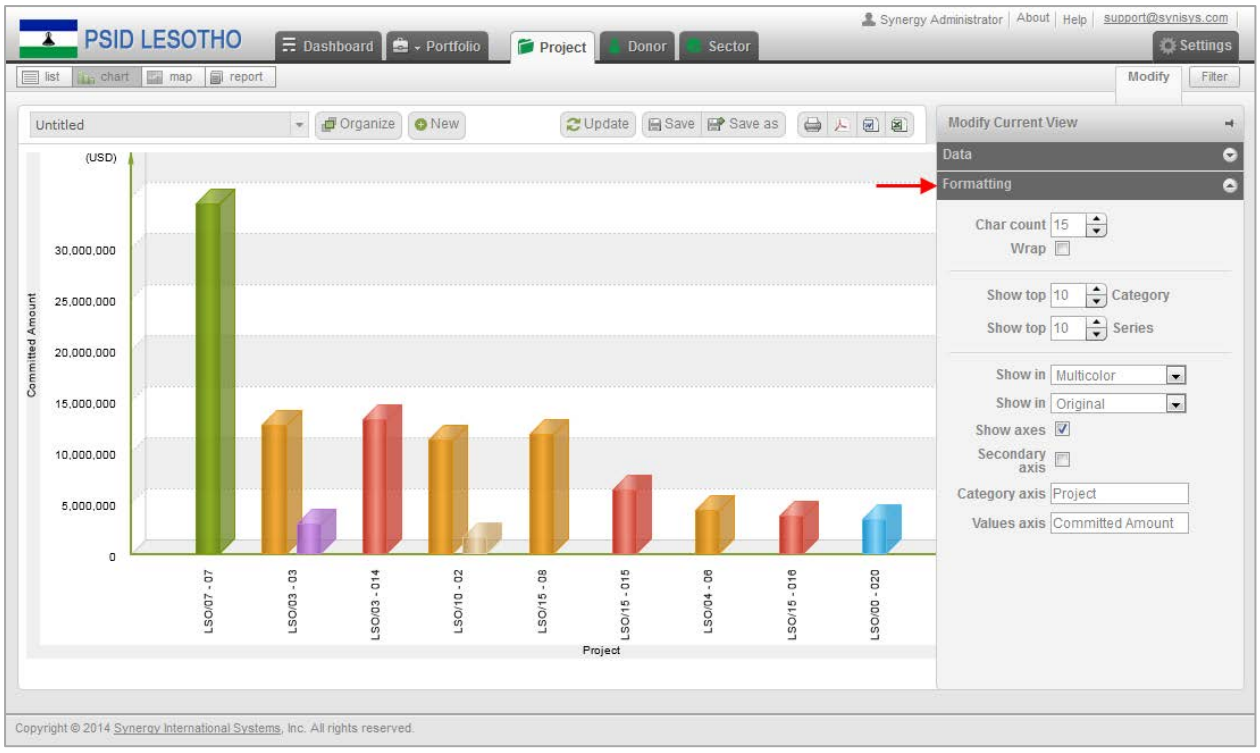


Figure 34: Selecting Formatting Options for the Chart Report

9. MAP MODULE

In the *Map* module of the *PSID Lesotho* application, you can make use of an advanced GIS tool for data visualization, mapping and analysis (Figure 35).

In this module, you can plot data directly on a map and then access that data through the map. You can also query, aggregate, disaggregate, filter, and edit data on a map, visually capture data at any desired level, from the most general to the most detailed, down to the district level.

Moreover, the GIS tool offers an impressive array of state-of-the-art, advanced GIS features, such as the ability to zoom freely; to select a point on a map and ask the system to display any category of data within a given radius ('buffered zone querying').

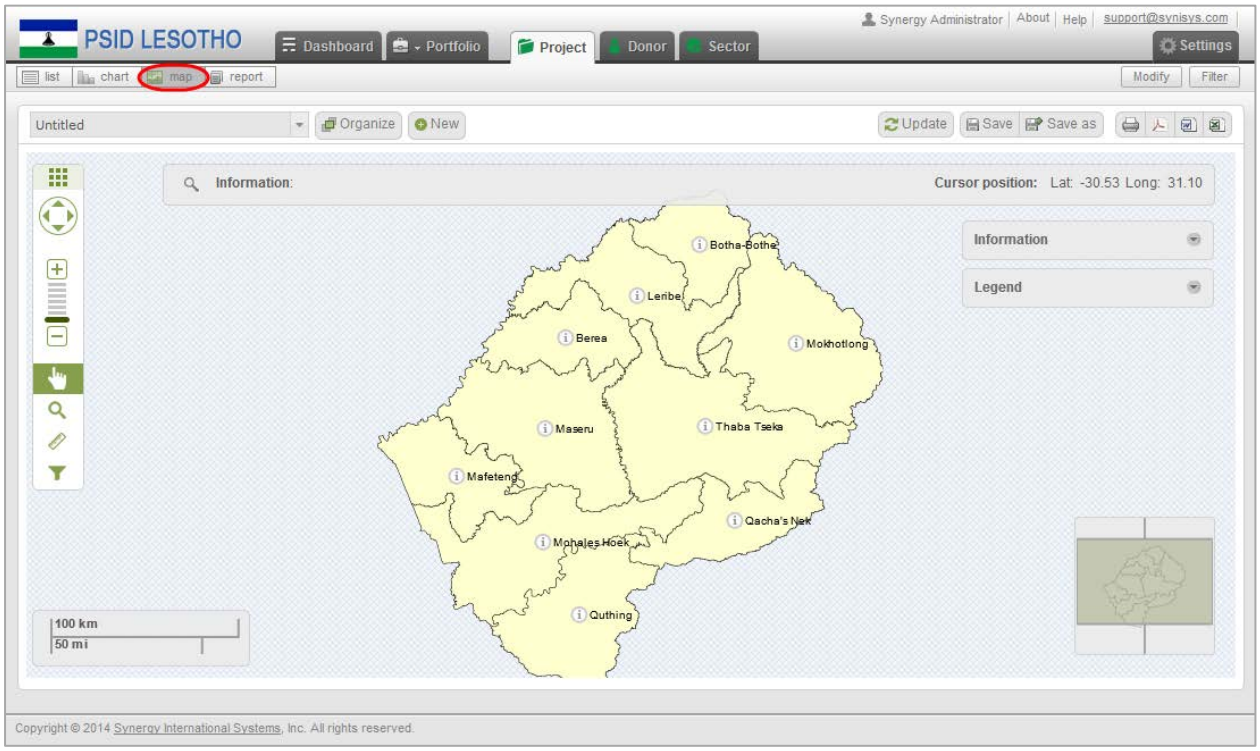


Figure 35: Map Module

9.1 Accessing the Map Module

To access the *Map* module, go to **Project → Map**. You will be navigated to the *Map* module (Figure 35).

In the *Map* module, you can choose to view different data sets displayed on the map, create and display reports, save them as pre-defined reports, arrange them in the desired way, print them, etc.

9.2 Creating a Map Report

To create a new map report, follow the steps below:

1. Go to the **Map** module of the *Project* dataset in *PSID Lesotho*.
2. Click the **Modify** button in the reporting options bar. The *Modify Current View* panel will appear (Figure 36).
3. In the *Data* tab, select the data that will appear in the map report. They will include the map category, chart type, etc.
4. In the *Formatting* tab, define additional properties for the map report. They will include selection of the scaling, administrative boundaries, etc.
5. Click the **Update** button generate a map report according to the selections made.

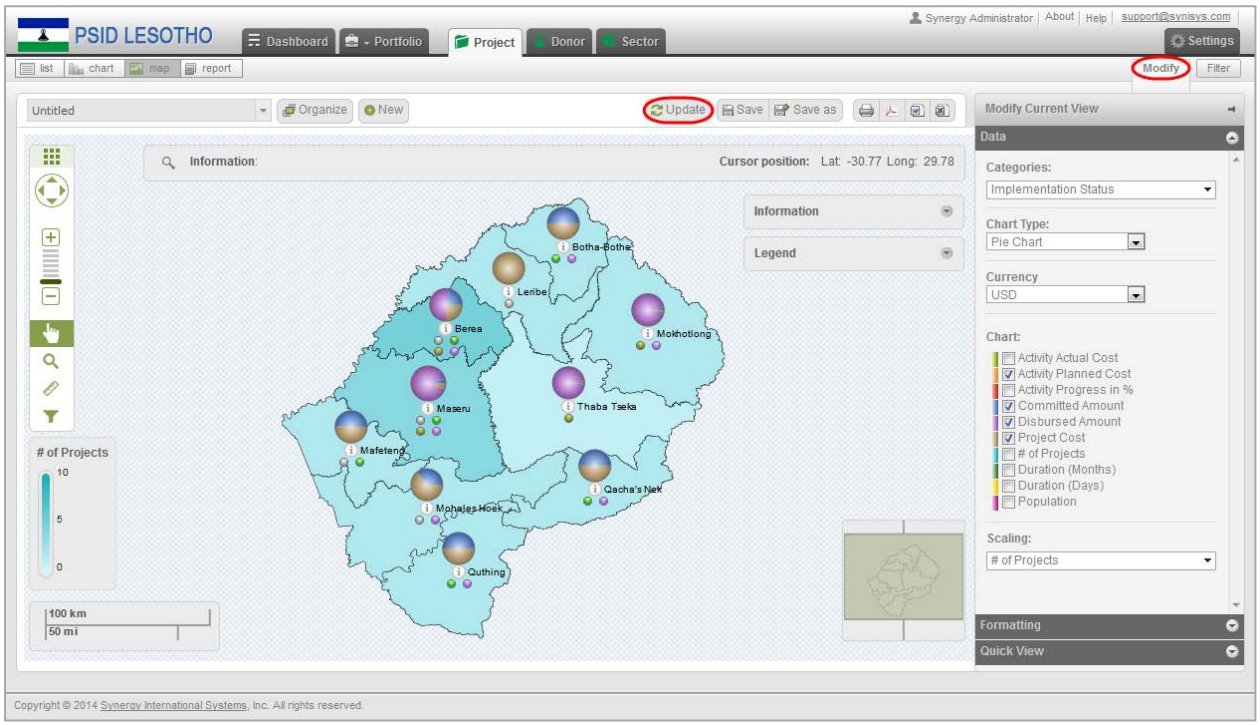


Figure 36: Creating a Map Report

9.2.1 Defining Data for the Map Report

To define what data should appear on the map, follow the steps below:

1. Go to the **Data** tab in the *Modify Current View* panel (Figure 37).
2. Select the following options:

Data Field	Description
Category	Allows selecting one of the options provided in the *Category* drop-down menu. The selected category will define one of the map values.
Chart Type	Allows defining whether the data should be presented in form of a pie chart or a bar chart when plotting graphs on the map.
Currency	Allows defining the currency in which the map values will be expressed.
Chart	Allows selecting a category to display on the map in the chart form.
Scaling	Allows plotting category data on the map and to view them

	in different colors.

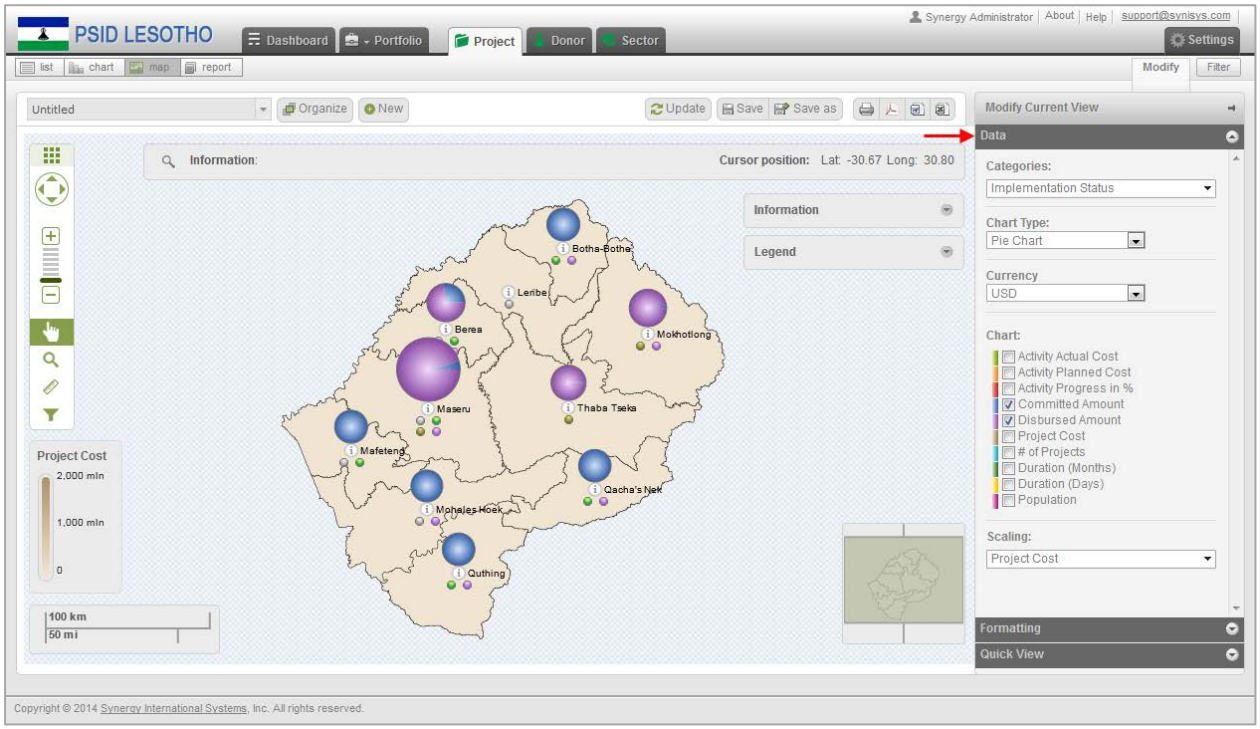


Figure 37: Defining Data for a Map Report

9.2.2 Selecting Formatting Options for the Map Report

To define formatting options for the map report, follow the steps below:

1. Go to the **Formatting** tab in the *Modify Current View* panel (Figure 38).
2. Select the following options:

Formatting Field	Description
Scaling	Allows defining whether **Auto** or **Custom** scaling should be applied to the map report. If the *Custom* option is selected, it will be necessary to specify the following information: • **Clusters** – to define the number of clusters to be shown on the map • **Range -** to define the color for each cluster.
Administrative Boundaries	Displays border information for all territorial units in the country.
Information	Defines whether the *Information* box should be plotted on the map. It will provide additional information about Unspecified category values.
Legend	Defines whether the *Legend* box should be plotted on the map. It will hold explanations for the category icons displayed on the map.
Mini map	Enables an overview map of the entire country displayed in a small window allowing quick navigation to a desired location with one click without having to zoom out, find the new

	location and zoom in again.
Labels	Shows pieces of text, such as the names of the provinces / districts, on the map.
'i' icons	Plots information markers on the map.

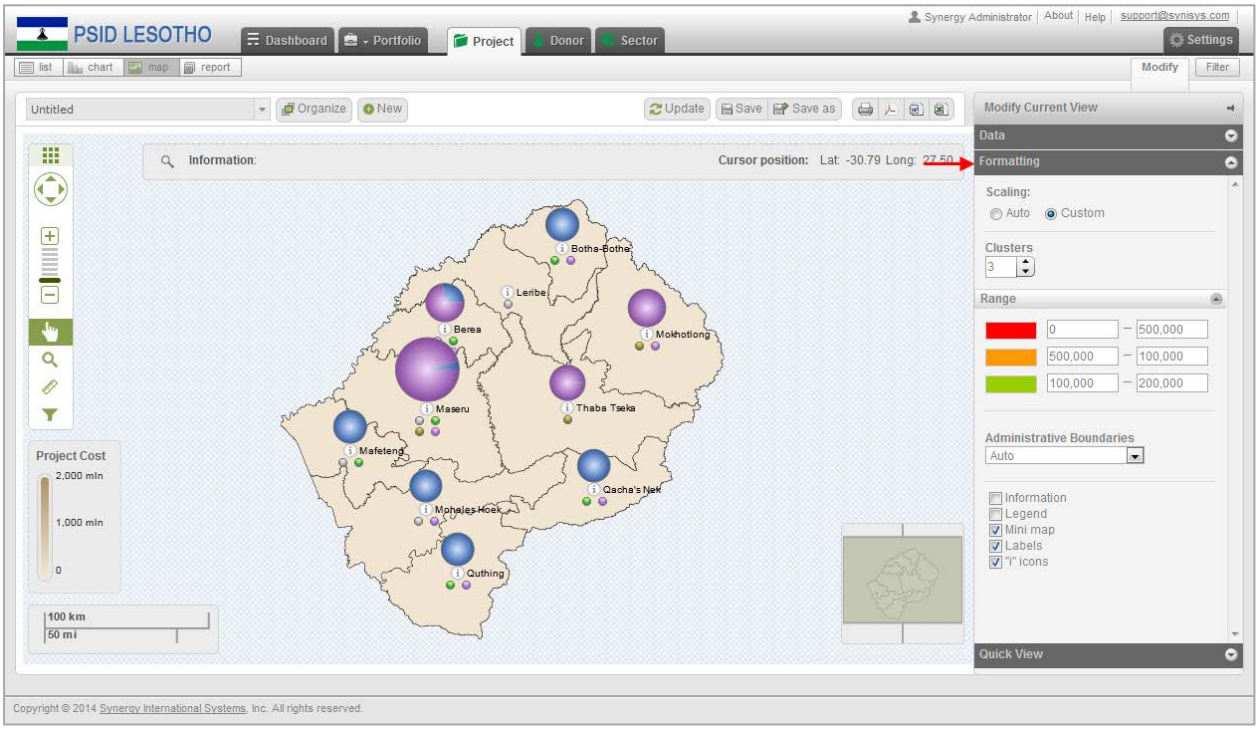


Figure 38: Selecting Formatting Options for the Map Report

9.2.3 Defining Quick View for the Map

In the *Map* module, you can select to plot information boxes on the map reports. The information boxes are a convenient way of presenting reference data related to a definite territorial unit.

To make the information boxes serve their purpose better, the *Map* module provides you with the possibility of defining what references you what an information box to contain. This can be done in the *Quick View* tab.

To define what references an information box should contain, follow the steps below:

1. Go to the **Quick View** tab in the *Modify Current View* panel (Figure 39).
2. Select the following options:

Note: Please, take into account that only the measures selected in the *Quick View* tab will be included in the information boxes.

Quick View Field	Description
Icons	Specify whether the measures selected in this tab should be accompanied with the appropriate icon in the information boxes plotted on the map.

Category	Define what measures will be included in the information boxes plotted on the map. Please note that this section will only contain the measures that are related to the category selected for the map report.

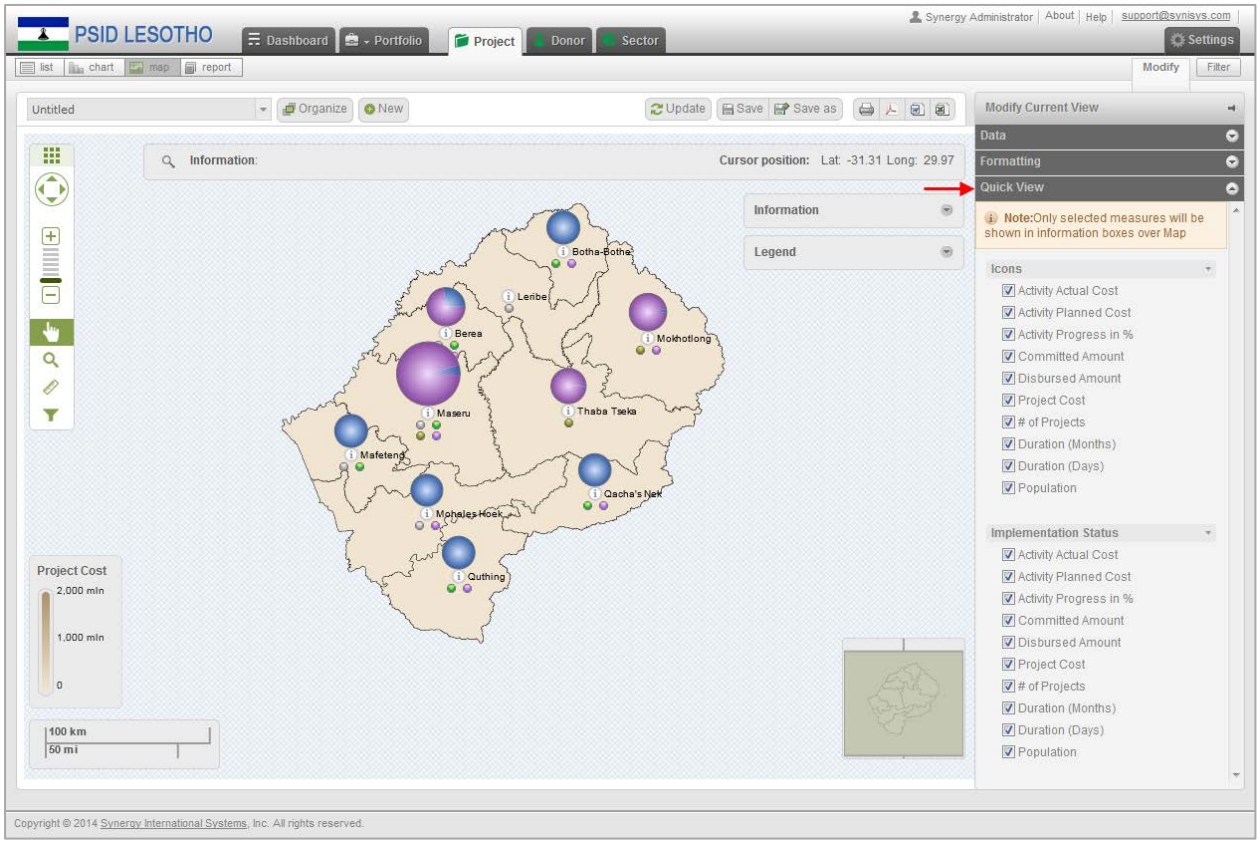


Figure 39: Selecting Quick View Options for the Map Report

9.3 Working in the Map Module

In the *Map* module of the *PSID Lesotho* application you can create state-of-the-art map reports that will allow you to present the application data in the most visually effective way. To better serve your mapping needs, this module has been enhanced with a number of controls that facilitate interaction with the map displayed. The controls toolbar can be found in the upper left corner of the *Map* module workspace under and can be shown or hidden at your discretion.

This chapter will guide you through the steps to work in the *Map* module using the controls available.

9.3.1 Zooming in / Zooming out

The GIS tool is equipped with the advanced zooming capabilities used to enlarge or reduce the view of the map on the screen. The following zooming options are available:

Scaled zoom in / zoom out

This option allows zooming in / zooming out using the scale tool available in the Advanced GIS.

This means that when changing the zoom scales by clicking either or , you can magnify or reduce the viewport according to the scale value.

Mouse wheel-based zoom-in/zoom-out

This option supports mouse wheel-based zooming in / zooming out. To enlarge or reduce the viewport using the scroll wheel button of the mouse, you should click anywhere on the map and use the wheel button in the backward motion to zoom in and in the forward motion to zoom out.

Zoom by selection

This option allows magnifying the original viewport or a portion of it using the mouse. To be able to enlarge an area on the map, you should activate the *Zoom by Selection* option by clicking the button then select a region on the map to magnify.

9.3.2 Measuring Distance

In the *Map* module, you can measure the distance between two points on the map. To do this, click the button, select the point on the map and drag the mouse to the second point to trace a path to measure (Figure 40). The measured distance will be expressed both in metric and English units of measure.

Note: Measuring is calculated using the latitude and longitude coordinates from point to point and does not consider elevation.

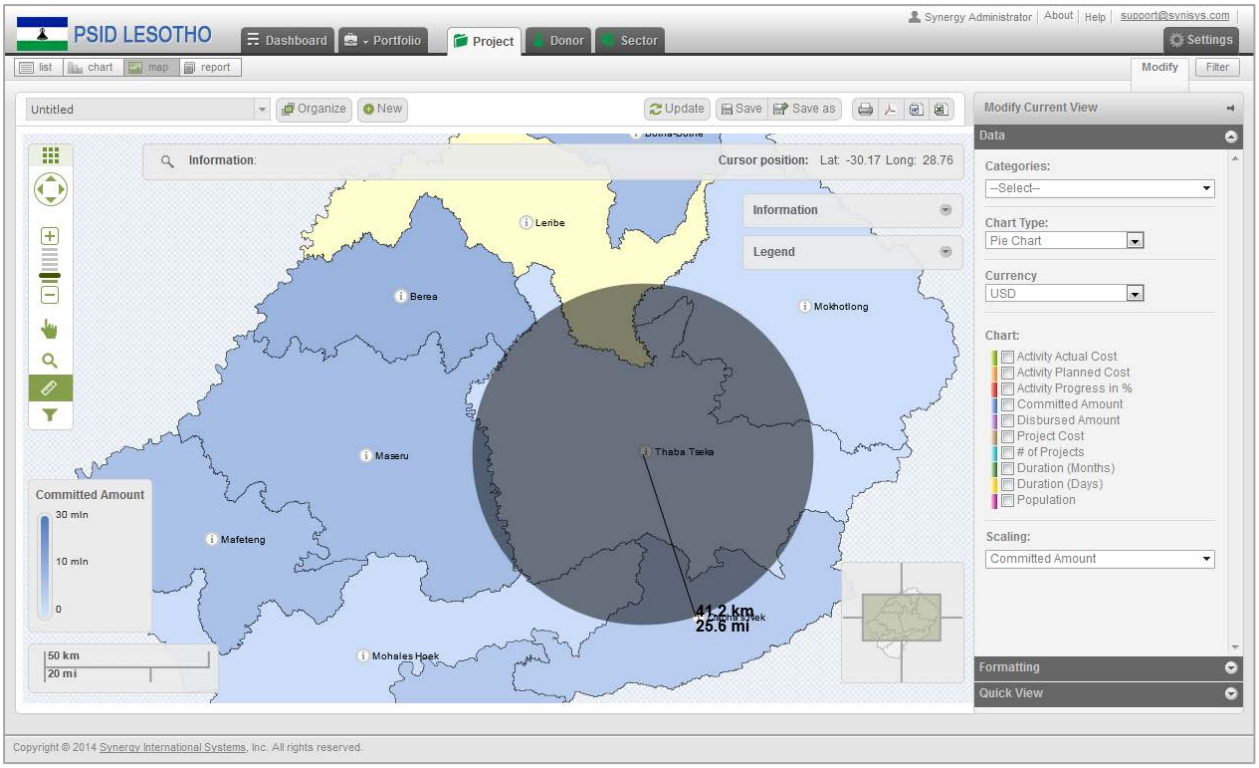


Figure 40: Measuring Distance

9.3.3 Buffered Zone Querying

This feature in the Advanced GIS tool is used to select a point on a map and display any type of data within a given radius. In addition, the tool is easily navigable through a Mini Map, Navigation Bar, and Tools.

To be able to create a buffer zone to view data for, select the button and then select the region on the map to highlight. The selected area will be activated while the rest of the screen will be disabled (Figure 41). This tool may be useful for presentations on screenshots to mark the selected area on the map.

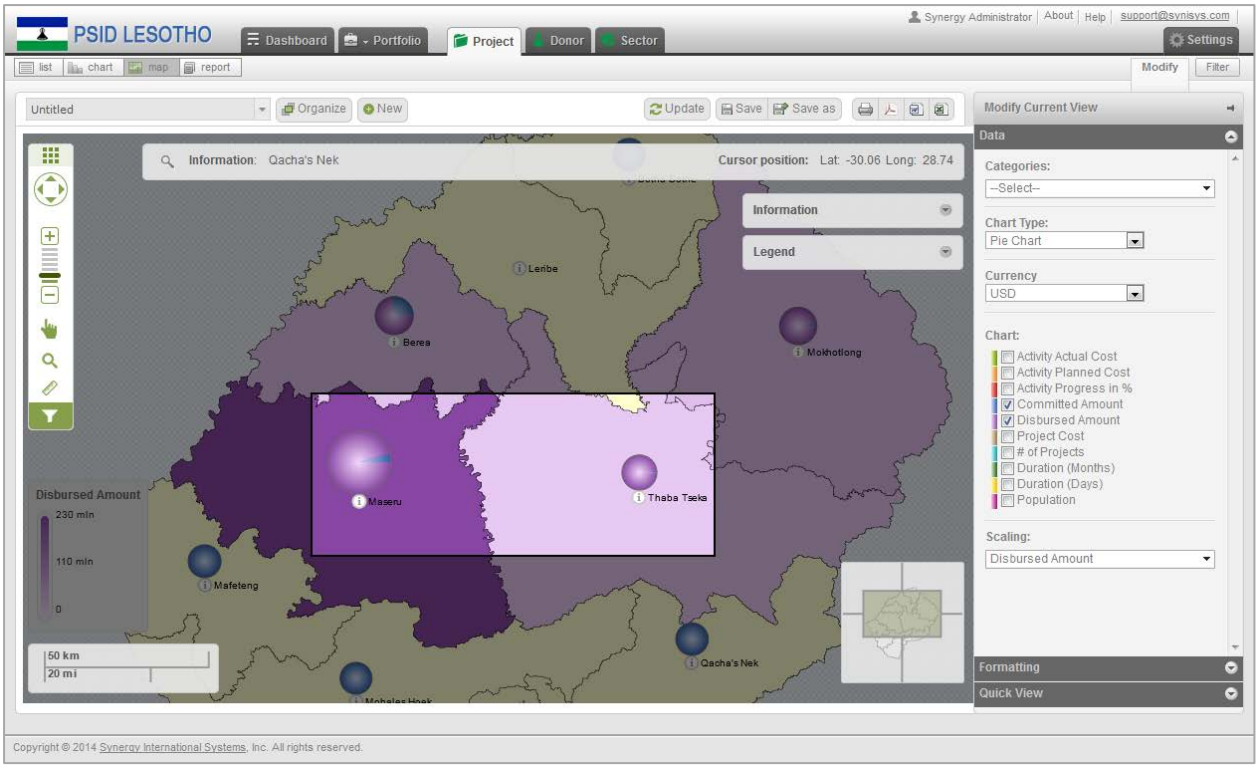


Figure 41: Buffered Zone Querying

9.3.4 Using Layers

The *Map* module provides a variety of data to select to display over the viewing area. You can display the following information:

- Display categories;
- Choose to view data on a scaling map;
- Plot data in the form of different graphs (pie chart or bar chart);
- Display map features such as department or arrondissement borders.

The following layers can be applied in *PSID Lesotho*:

Scaling

This option is used to view the data on a scaling map. This means that the selected data series will not be displayed in form of graphs, but the administrative territories will be colored according to the selected scaling category instead. The scaling legend at the bottom left side of the map prompts on the coloring pattern used.

To view the data on a scaling map, follow the steps below:

1. Expand the **Data** tab in the *Modify Current View* panel.
2. Select one of the possible alternatives listed in the *Scaling* drop-down list.

You can also define custom scaling for the map by setting new coloring patterns. To create custom scaling, follow the steps below:

1. In the *Data* tab of the *Modify Current View* panel, select the value to be plotted on a scaling map from the *Scaling* drop-down list.

2. In the *Formatting* tab of the *Modify Current View* panel, select the **Custom** scaling option (Figure 42).
3. Define the number of **Clusters** to be plotted.
4. Specify the coloring **Range.**
5. Click the **Update** button for the changes to take effect.

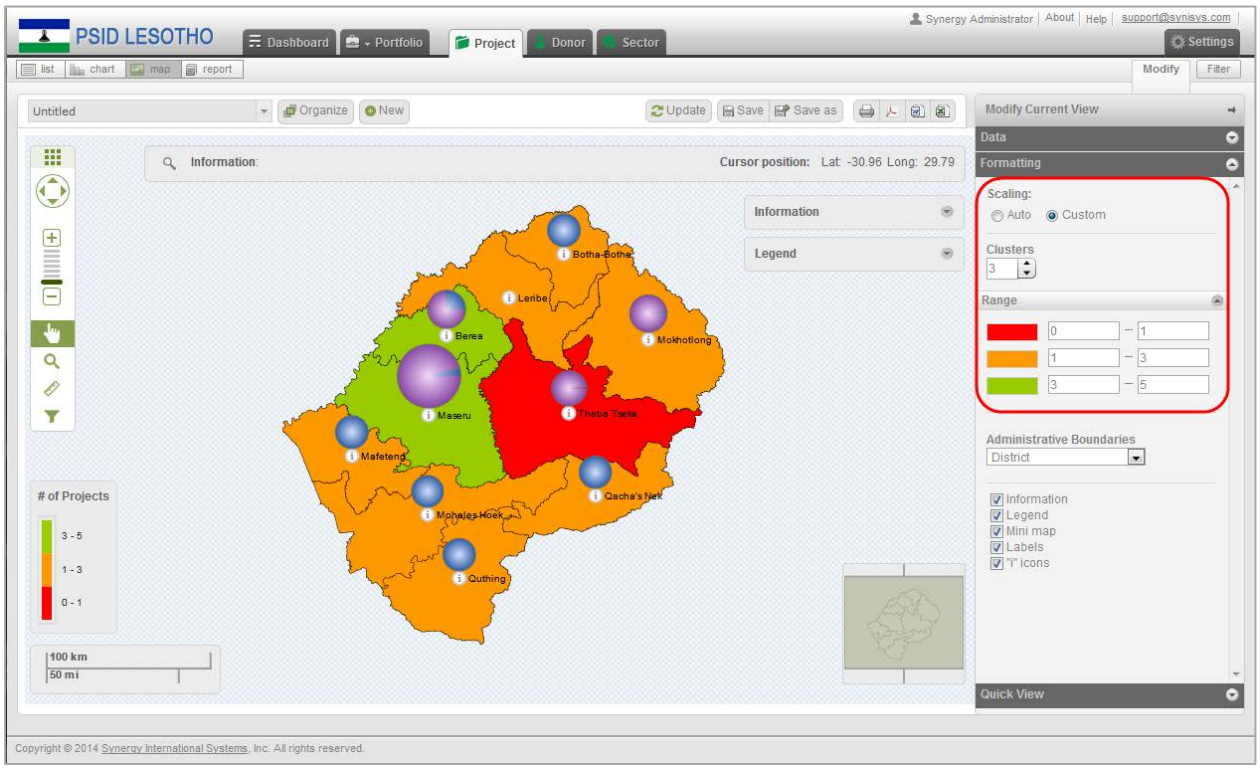


Figure 42: Selecting Scaling Range

Chart

You can plot different data series on a map and view them in the form of different graphs, such as pie charts or bar charts. You can turn on this option by expanding the *Data* tab in the *Modify Current View* panel and selecting the chart category(-ies) to be displayed on the map. By default, the selected category(-ies) will appear in the form of a bar chart. However, you can choose to view the data in form of a pie chart by selecting the appropriate option from the *Chart Type* drop-down (Figure 43).

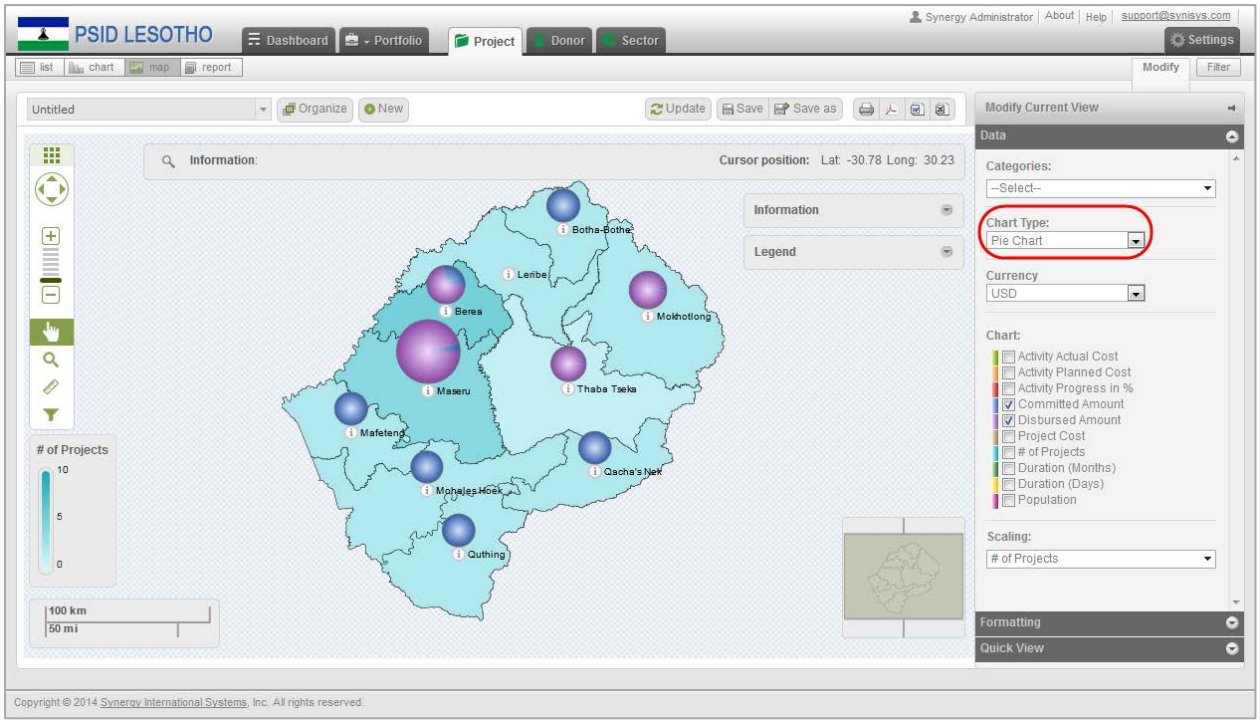


Figure 43: Selecting Chart Type

Administrative Boundaries

You can turn on border information by expanding the *Formatting* tab in the *Modify Current View* panel and selecting one of the following options from the *Administrative Boundaries* drop-down list (Figure 44):

- **Auto -** displays border information for all territorial units when the zoom-in option is selected. For example, if you zoom in to province level, the border information for both districts and constituencies will be displayed on the map.
- **District -** displays the border information for all districts.
- **Constituency –** displays the border information for all constituencies.

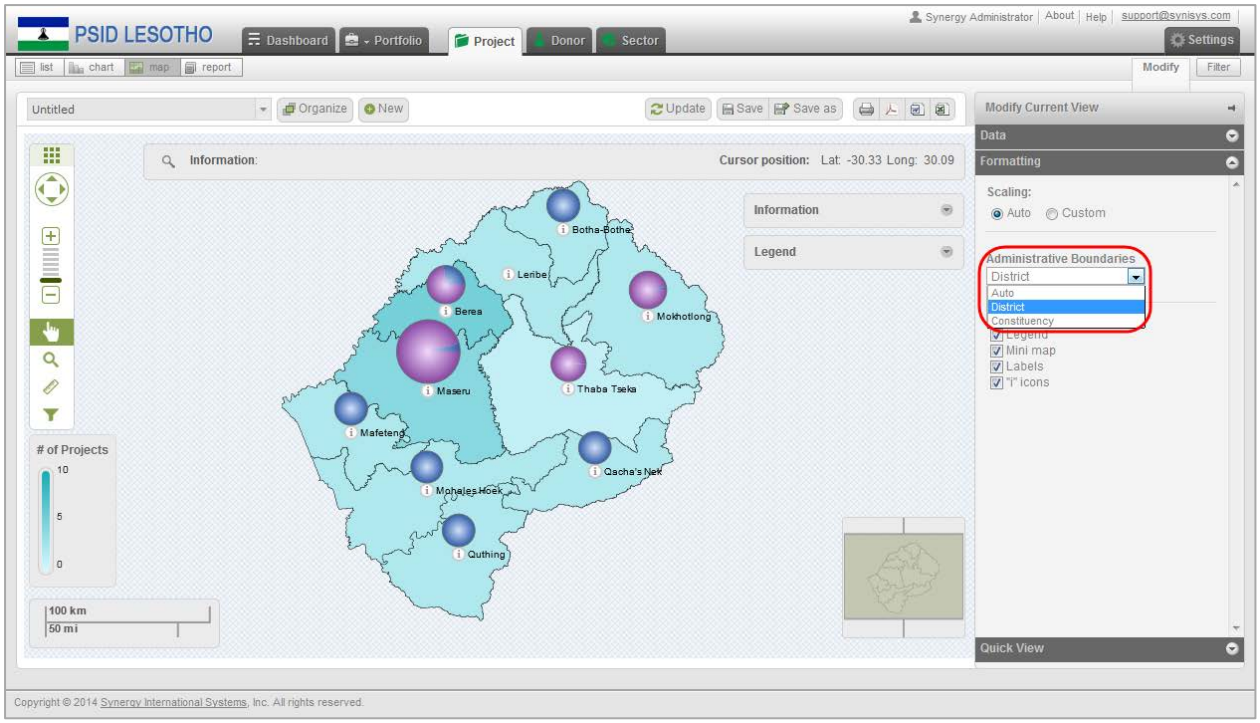


Figure 44: Setting Administrative Boundary Options

9.3.5 Viewing Legend

To explain the data series or categories on the map, the legend is used to identify the patterns or colors that are assigned to the selected categories (Figure 45). It is worth mentioning that each data series or category is represented by a unique pattern or color in the map legend, which is displayed in the following ways:

- In the *Legend* box if you have chosen to enable this option in the *Formatting* tab of the *Modify Current View* panel.
- At the bottom left side of the map if you have selected to view data on the scaling map.

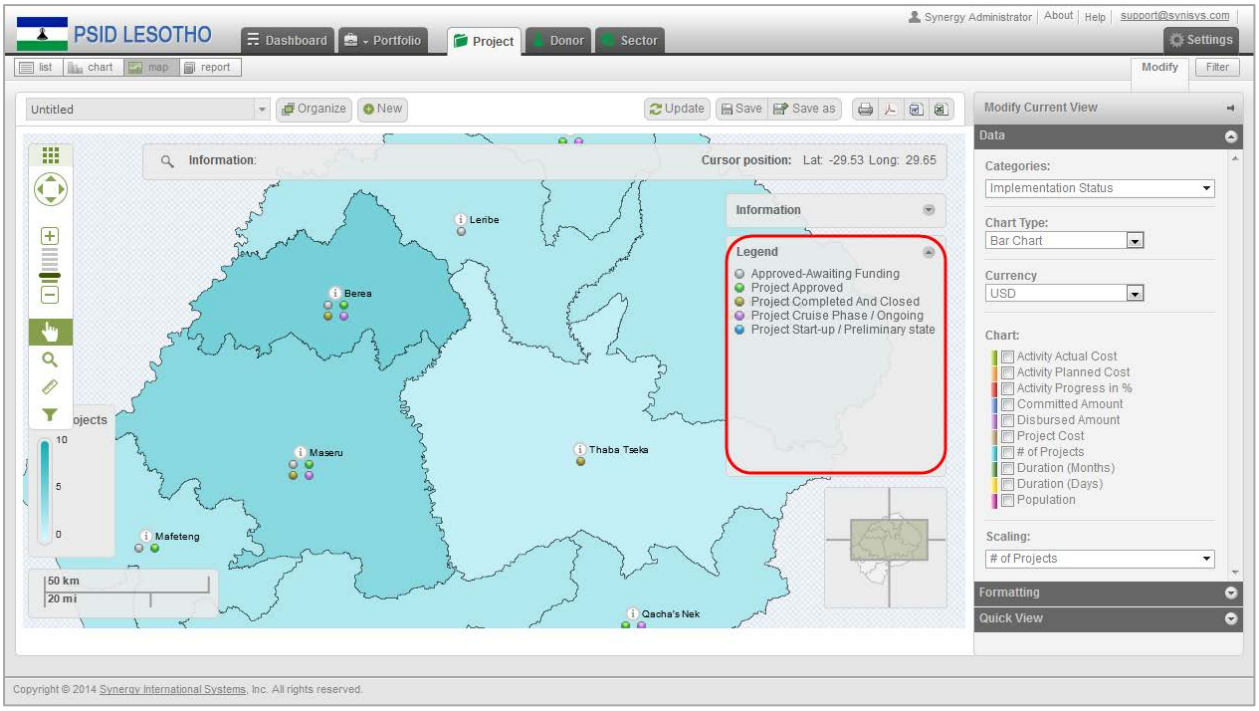


Figure 45: Viewing Map Legend

9.3.6 Using Mini Map

The Mini Map window feature displays an additional view of the country map with a position indicator that corresponds to the current view inside the main screen (Figure 46). One of the main features of the Mini Map is that while the Mini Map window responds to position adjustments in the main screen, you can also interact directly with it. Clicking any area within the window or dragging the position cursor to the desired place will adjust position both in the Mini Map and in the main screen to the point in the Mini Map window that the user selects.

To enable the Mini Map option, follow the steps below:

1. Expand the **Formatting** tab in the *Modify Current View* panel.
2. Activate the **Mini map** option by ticking the respective checkbox.

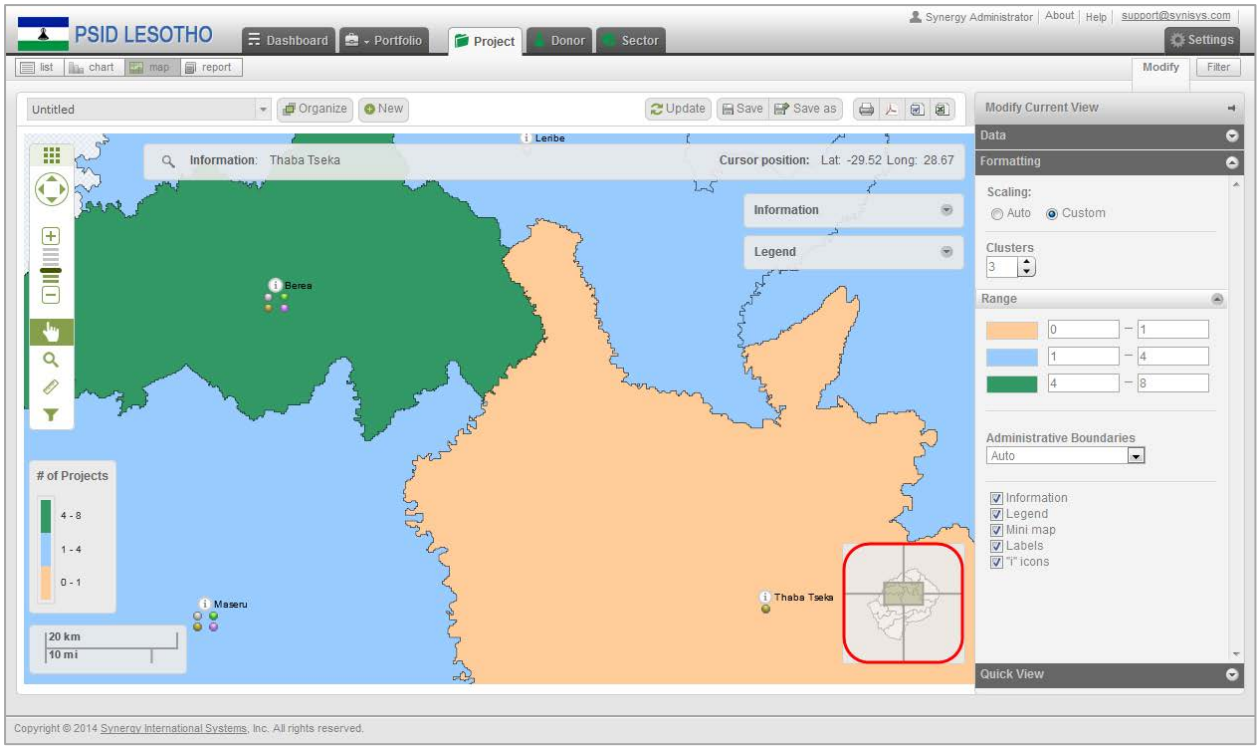


Figure 46: Using Mini Map

9.3.7 Viewing the Data Displayed on the Map

The Advanced GIS tool is used to view the data referring to definite territorial units – provinces or districts - when zoomed in to this level. To access the data for a specific territorial unit, point the mouse cursor on the ℹ button (Figure 47). The information in the displayed tooltip includes but is not limited to the number of projects currently being implemented in the given location, project financial information, etc. If you have plotted any chart category on the map, the chart category details appear in the information window as well.

To plot information icons on the map, follow the steps below:

1. Expand the **Formatting** tab in the *Modify Current View* panel.
2. Activate the **'i' icons** option by ticking the respective checkbox.

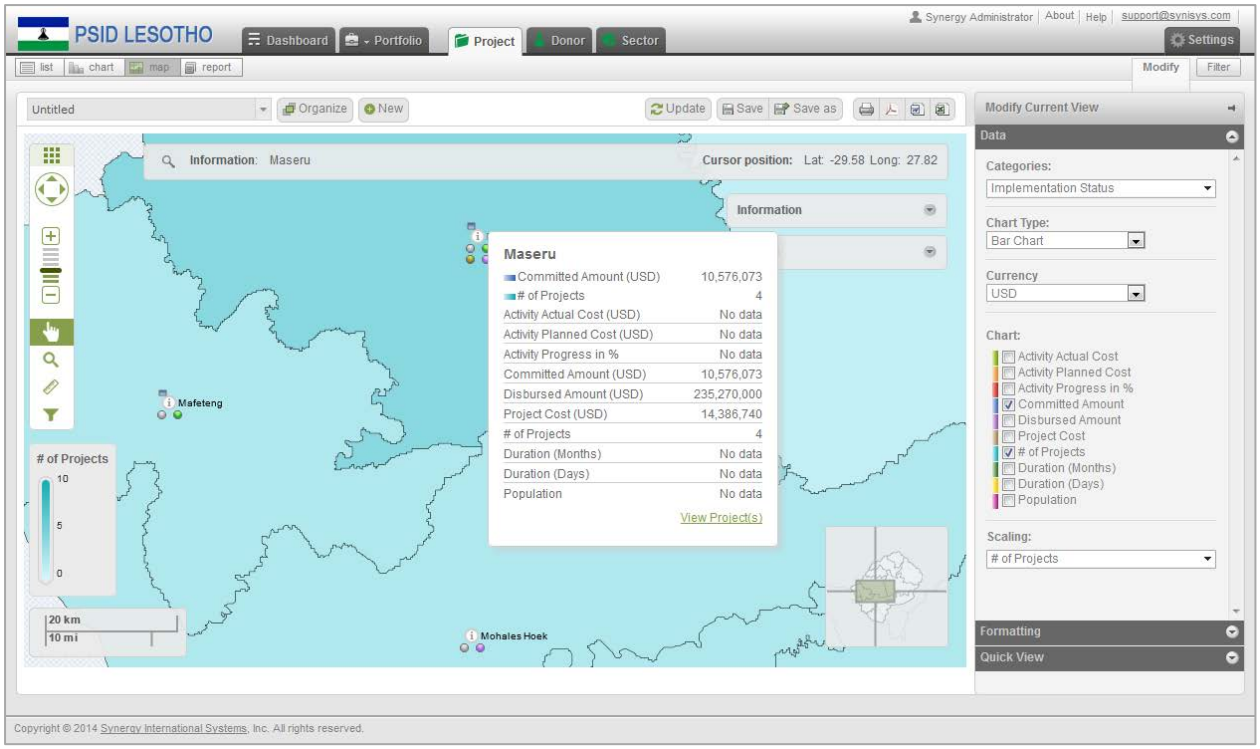


Figure 47: Viewing the Data Displayed on the Map

10. REPORT MODULE

In the *Report* module of *PSID Lesotho* (Figure 48), you can create and execute ad-hoc queries on the data and acquire results in the form of a tabular or freeform report.

Table reports are a convenient way of presenting more than one record at a time. A basic table report consists of rows and columns, where each row is one record and each column is a field. The *Report* module offers a comprehensive methods and techniques for table report design and customization (e.g. it is possible to group records in different tables according to the report grouping selected, apply formatting, define totals to show before the data, etc.)

At the same time, freeform layout reports add an additional level of flexibility to the data querying and reporting capabilities as well as the way your data is presented. Unlike table reports where the data is grouped in a grid, freeform reports arrange the records using a free-form layout where there is no division between the categories and measures that comprise the rows and columns in a tabular report.

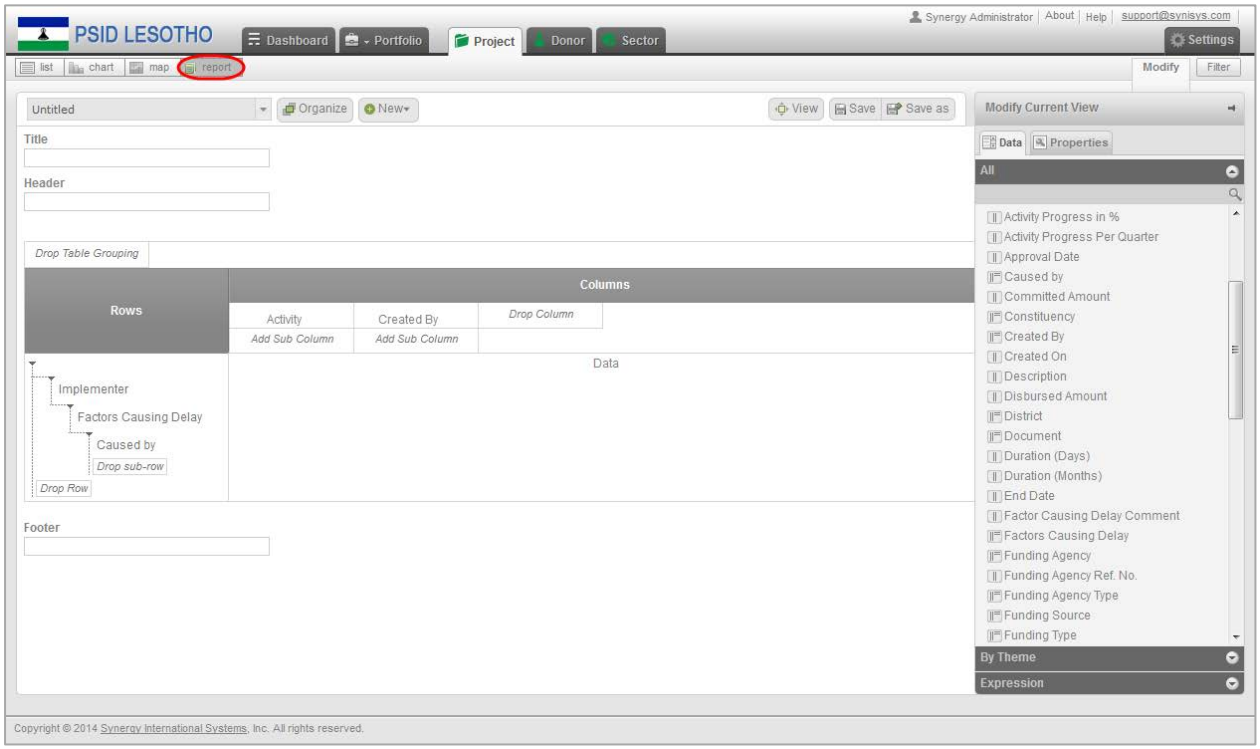


Figure 48: Report Module

10.1 Accessing the Report Module

To access the *Report* module, go to **Dataset → Report**. You will be navigated to the *Report* module (Figure 48) of the selected dataset (project, donor, or sector).

In this module, you can structure and format table reports, save them as pre-defined reports, arrange them in the desired way, print them, etc.

10.2 Creating a Tabular Report

To create a new tabular report, follow the steps below:

1. Go to the **Report** module of the *Project/Donor/Sector* dataset in *PSID Lesotho* (Figure 48).
2. Click the **New** button on the main toolbar and select the **Create new tabular report** option (Figure 49).
3. Structure the report by selecting the appropriate components for it in the *Data* tab. For more details, see Structuring a Tabular Report.
4. Assign additional characteristics to the report in the *Properties* tab. For more details, see Assigning Properties to a Tabular Report.

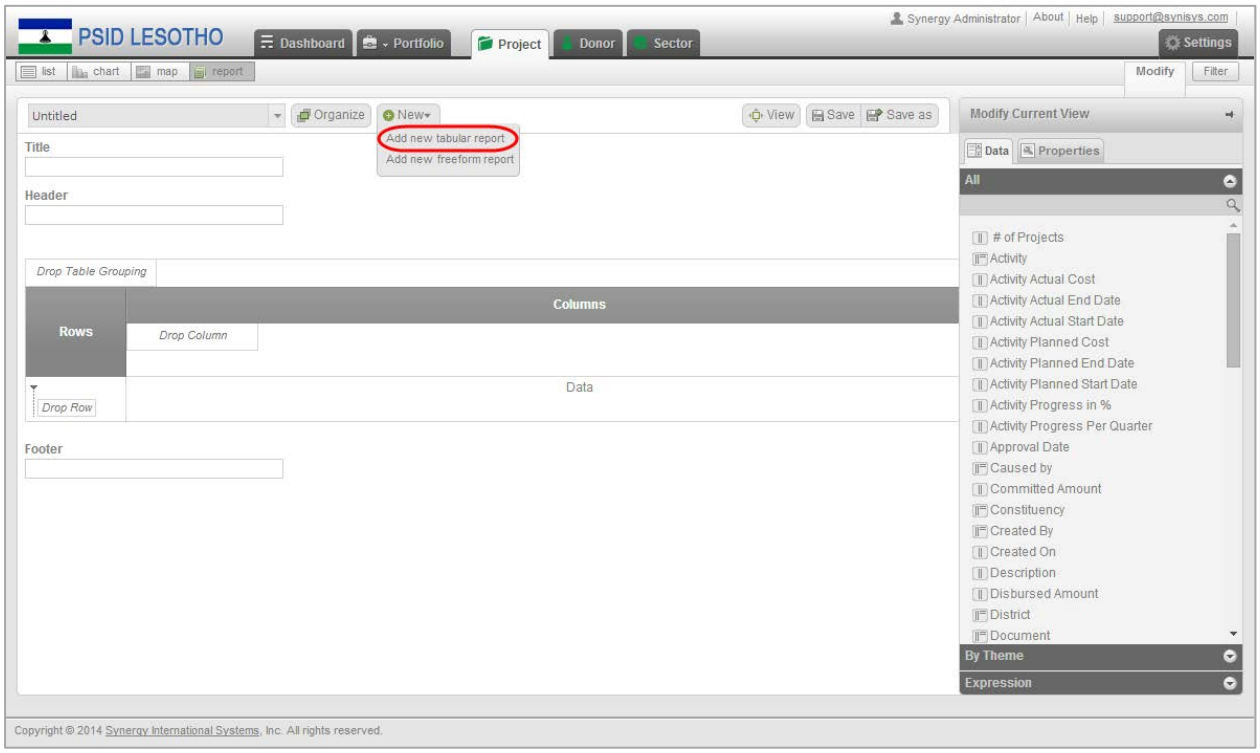


Figure 49: Creating a Tabular Report

10.2.1 Structuring a Tabular Report

To structure a tabular report, follow the steps below:

1. Click the **Modify** button in the reporting options bar. The *Modify Current View* panel will appear.
2. Type the text that should appear as the report title in the **Title** text box.
3. Enter the report **Header** and **Footer**, if needed.
4. In the *Data* tab, select the categories and measures that will stand for report table groupings, rows, and columns. The categories and measures are displayed in the following sub-tabs:
   - **All** – displays all categories and fields existing in the *PSID Lesotho* application.
   - **By Theme** – displays all existing categories and fields grouped by theme.
   - **Expression** – allows adding expressions to the report. For details, see Managing Report Expressions.
5. Hold the left mouse button until a green tick appears on the selected component.

6. Release the mouse button.

10.2.2 Assigning Properties to a Tabular Report

To set properties for a tabular report, follow the steps below:

1. Go to the **Properties** tab in the *Modify Current View* panel (Figure 50).
2. Under the *Reporting* tab, specify whether the serial numbers should be displayed in the report by selecting the appropriate checkbox.
3. Specify whether the unspecified data rows should be excluded from the report by selecting the **Hide unspecified** checkbox.

Note: You may also assign additional characteristics to the selected report components. For more details, see Formatting/Styling Report Components. Please, take into consideration that you may assign different sets of properties to tabular report components depending on the type of the component selected for it.

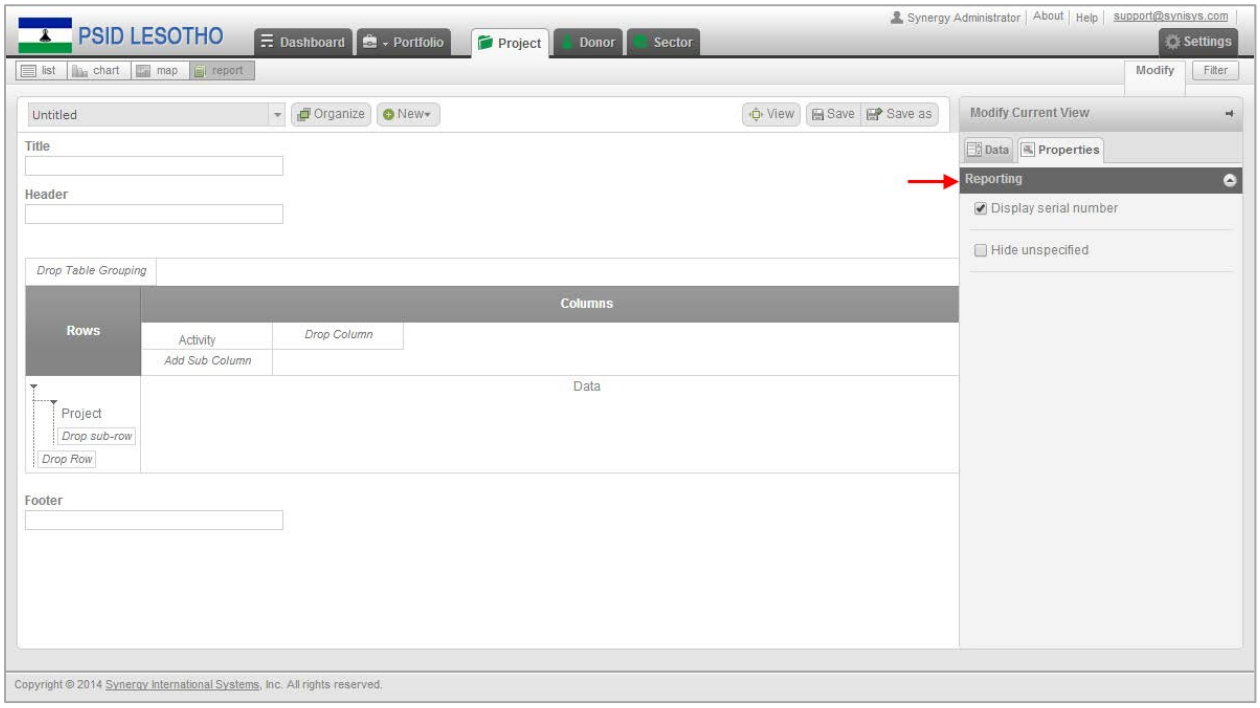


Figure 50: Setting the Tabular Report Properties

10.3 Creating a Freeform Report

To create a new freeform report, follow the steps below:

1. Go to the **Report** module of the *Project/Donor/Sector* dataset in *PSID Lesotho* (Figure 48).
2. Click the **New** button on the main toolbar and select the **Create new freeform report** option (Figure 51).
3. Structure the report by selecting the appropriate components for it in the *Data* tab. For more details, see Structuring a Freeform Report.
4. Assign additional characteristics to the report in the *Properties* tab. For more details, see Assigning Properties to a Freeform Report.

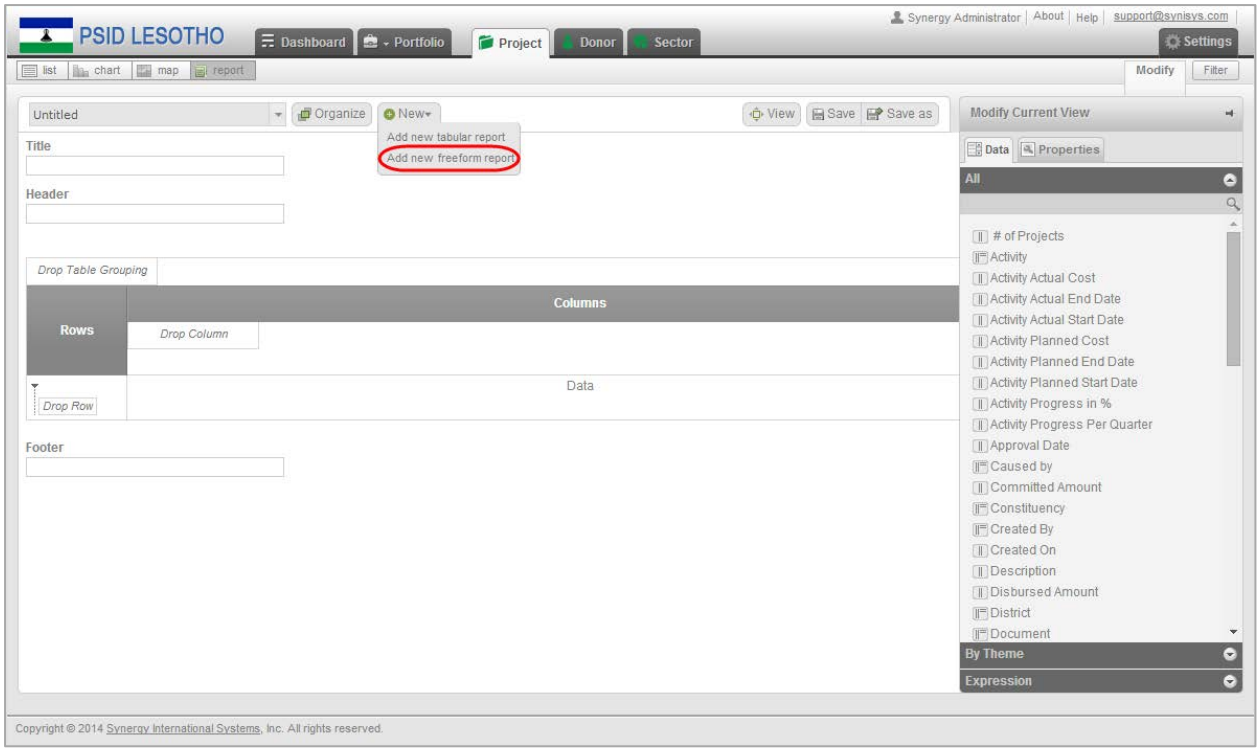


Figure 51: Creating a Freeform Report

10.3.1 Structuring a Freeform Report

To structure a freeform report, follow the steps below:

1. Click the **Modify** button in the reporting options bar. The *Modify Current View* panel will appear.
2. Type the text that should appear as the report title in the **Title** text box.
3. Enter the report **Header** and **Footer**, if needed.
4. In the *Data* tab, select the categories and measures that will stand for report rows. The categories and fields are displayed in the following sub-tabs:
   - **All** – displays all categories and fields existing in the *PSID Lesotho* application.
   - **By Theme** – displays all existing categories and fields grouped by theme.
   - **Expression** – allows adding expressions to the report. For details, see Managing Report Expressions.
5. Hold the left mouse button until a green tick appears on the selected component.
6. Release the mouse button.

10.3.2 Assigning Properties to a Freeform Report

To set properties for a freeform report, follow the steps below:

1. Go to the **Properties** tab in the *Modify Current View* panel (Figure 52).
2. Under the *Reporting* tab, specify how the records will be arranged in the freeform report by selecting the appropriate layout for it. The following options are possible:
   - List View
   - Table View
   - Numbered View
   - Bulleted View

3. Indicate the position that the selected report component names will occupy in the report by activating the respective radio button.
4. Specify whether the records in the report should be set out with border by selecting the **Show border** checkbox.

Note: You may also assign additional characteristics to the selected report components. For more details, see Formatting/Styling Report Components. Please, take into consideration that you may assign different sets of properties to freeform report components depending on the type of the component selected for it.

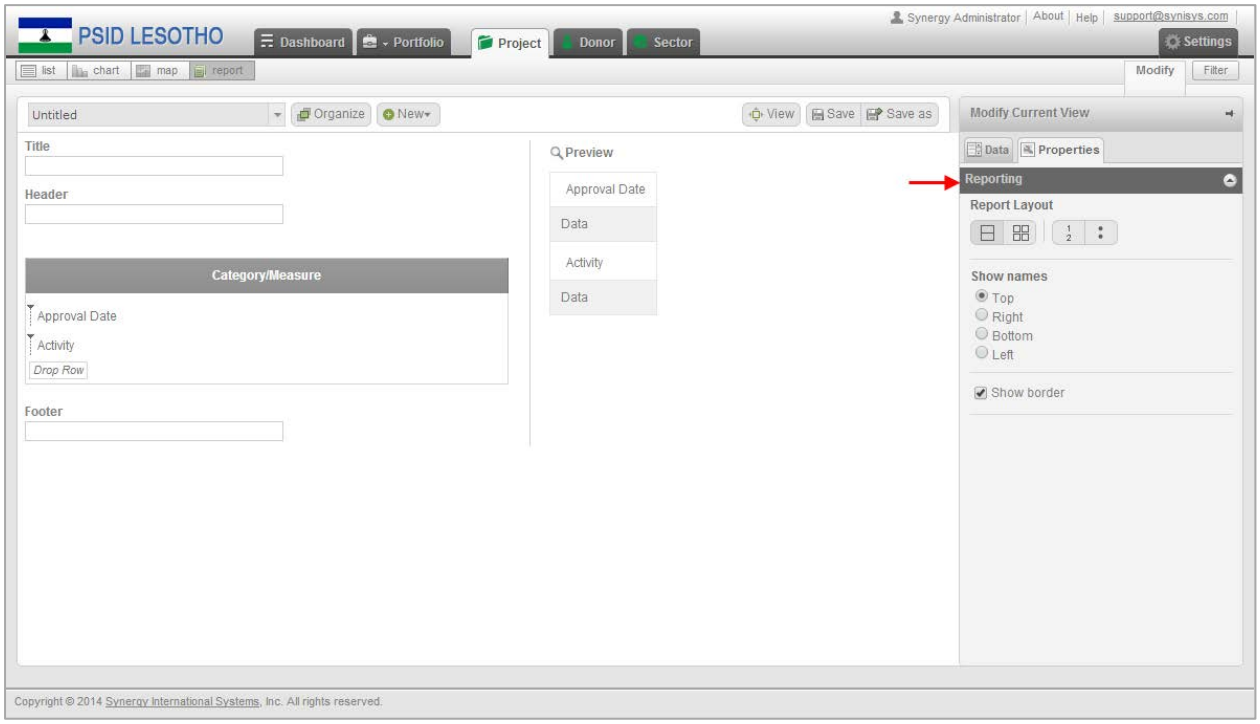


Figure 52: Setting the Freeform Report Properties

10.4 Managing Report Expressions

You can create different types of expressions and use them in table reports. Please note that expressions are user-specific, which means that they cannot be shared with other users of the *PSID Lesotho* application.

This chapter outlines how to create, edit and delete expressions.

10.4.1 Creating an Expression

In the *Report* module, you can design an expression, save it and use it as a report column.

To create an expression, follow the steps below:

1. Click the **Modify** button in the reporting options bar. The *Modify Current View* panel will appear (Figure 48).
2. In the *Data* tab, expand the **Expression** sub-tab.
3. Click the **Add Expression** button. An expression panel will appear (Figure 53).

4. Define the expression **Name**.
5. Specify the expression **Elements** and **Functions**.
6. Click the **Save** button to save the expression for future reference.

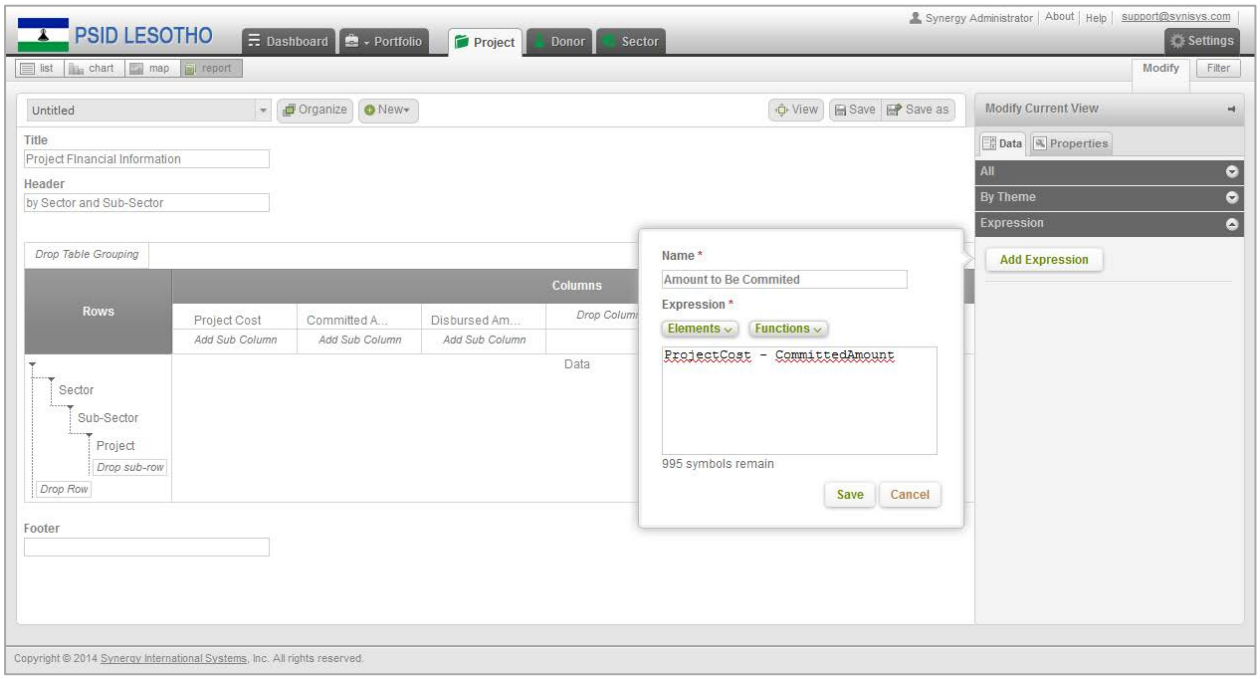


Figure 53: Creating an Expression

10.4.2 Editing Expressions

To edit an existing expression, follow the steps below:

1. Click the **(Edit)** button to the right of the record to be modified. An expression panel will appear (Figure 53).
2. Make the required changes.
3. Click the **Save** button to save the modifications made.

10.4.3 Deleting Expressions

To delete an expression, click the **(Delete)** button to the right of the record to be deleted.

10.5 Previewing a Report

After structuring the report, you can preview it to make sure that all data for analysis is included into it. To preview the report, click the View **(View)** button in the main toolbar (Figure 49).

10.6 Customizing Reports

You can customize the reports by assigning certain properties to the report components, re-ordering rows and columns, etc. The sections below will describe how to customize the reports.

10.6.1 Formatting/Styling Report Components

You may format/style the text entries as well as main report table components (table groupings, rows, and columns) by assigning to them value characteristics such as font, font size, font color, background color, alignment (i.e. left, center, or right), etc.

To format/style a report component, follow the steps below:

1. Click the report component that needs to be formatted / styled. The *Properties* section will appear (Figure 54).
   Note: The properties may vary based on the type of the component selected.

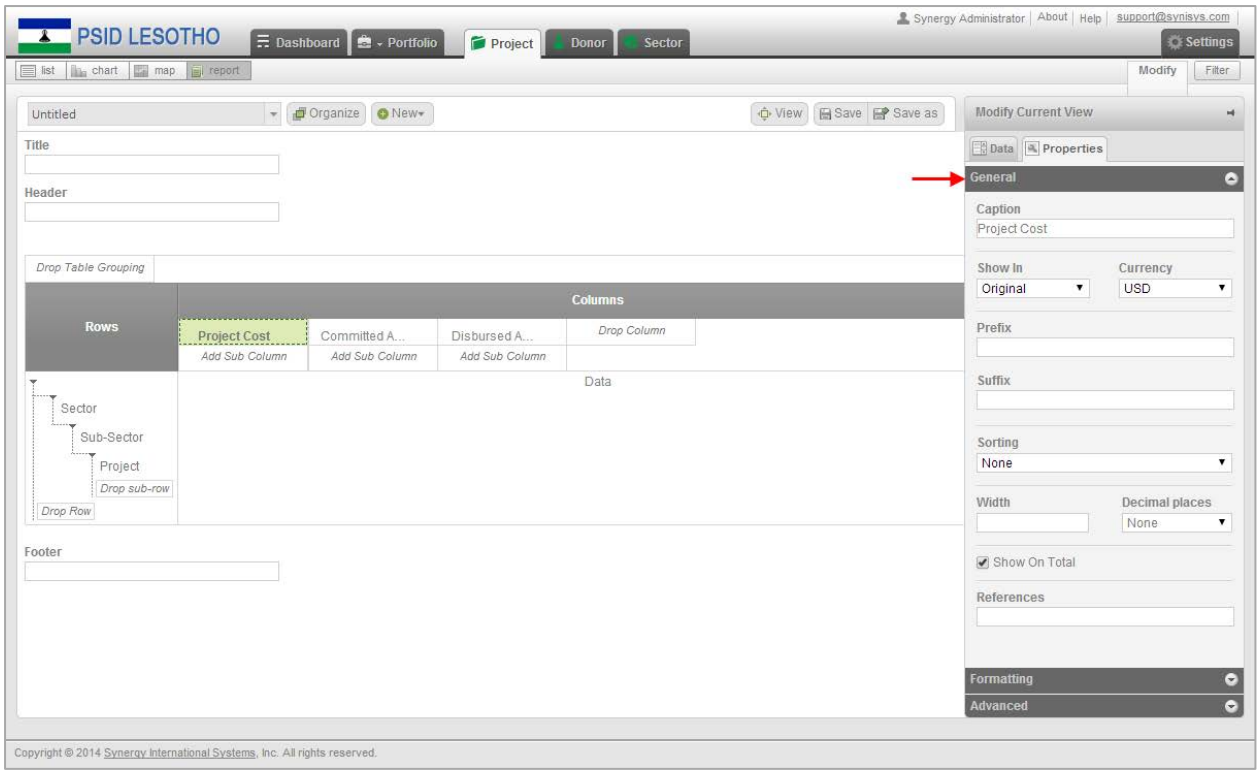


Figure 54: Report Component General Properties

Please note that for text entries (Title, Header, and Footer), the *Properties* section includes text **Formatting** options (e.g. font, font size, alignment, etc.) For other report components, like rows, columns, etc., the *Properties* window also allows assigning **General** characteristics, e.g. sorting order, reference text, etc. (Figure 54) Moreover, you can use conditional formatting for them by setting to them **Advanced** properties (see Setting Advanced Properties to Report Components).

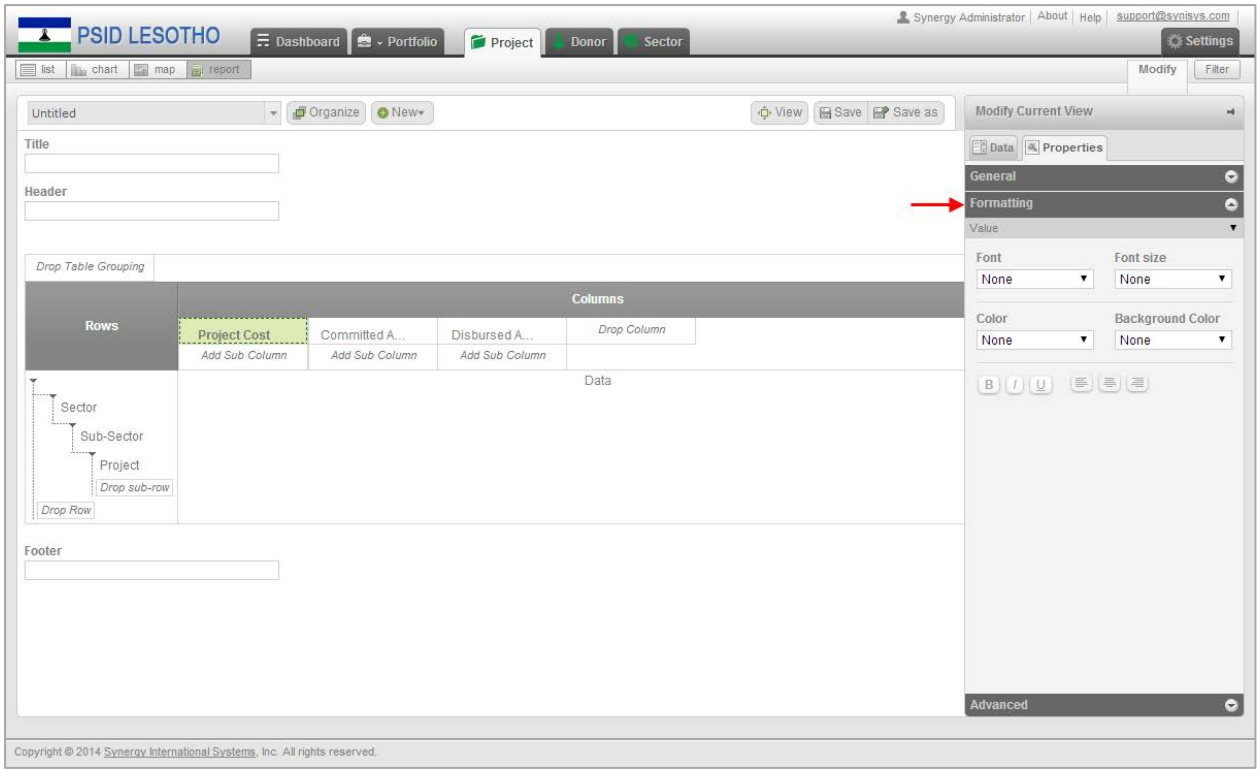


Figure 55: Report Component Formatting Properties

2. Change the properties as needed.
3. Save the report for future reference.

10.6.2 Setting Advanced Properties to Report Components

In the *Report* module, you can set a condition for a report component and apply definite formatting rules to it based on the specified condition for tabular reports. For freeform reports, setting advanced properties implies creating filtering conditions for report rows.

To define conditional formatting rules for tabular reports, follow the steps below:

1. Click the **Modify** button in the reporting options bar. The *Modify Current View* panel will appear.
   Note: You should switch to the *Design* mode.
2. Click the report component that needs to be assigned conditional formatting.
3. Expand the **Advanced** sub-tab under the *Properties* tab.
4. Click the **Add** button. An expression panel will appear (Figure 56).
5. Select the condition **Member 1** from the drop-down list.
6. Specify the condition **Operator** and **Value** in the respective fields.
7. Define the selected component conditional formatting **Color** and **Background Color**.
8. Specify the text formatting options (bold, italic, and underline) and text alignment options (left, center, or right) for the selected report component.
9. Preview the report by pressing the View **(View)** button in the main toolbar.

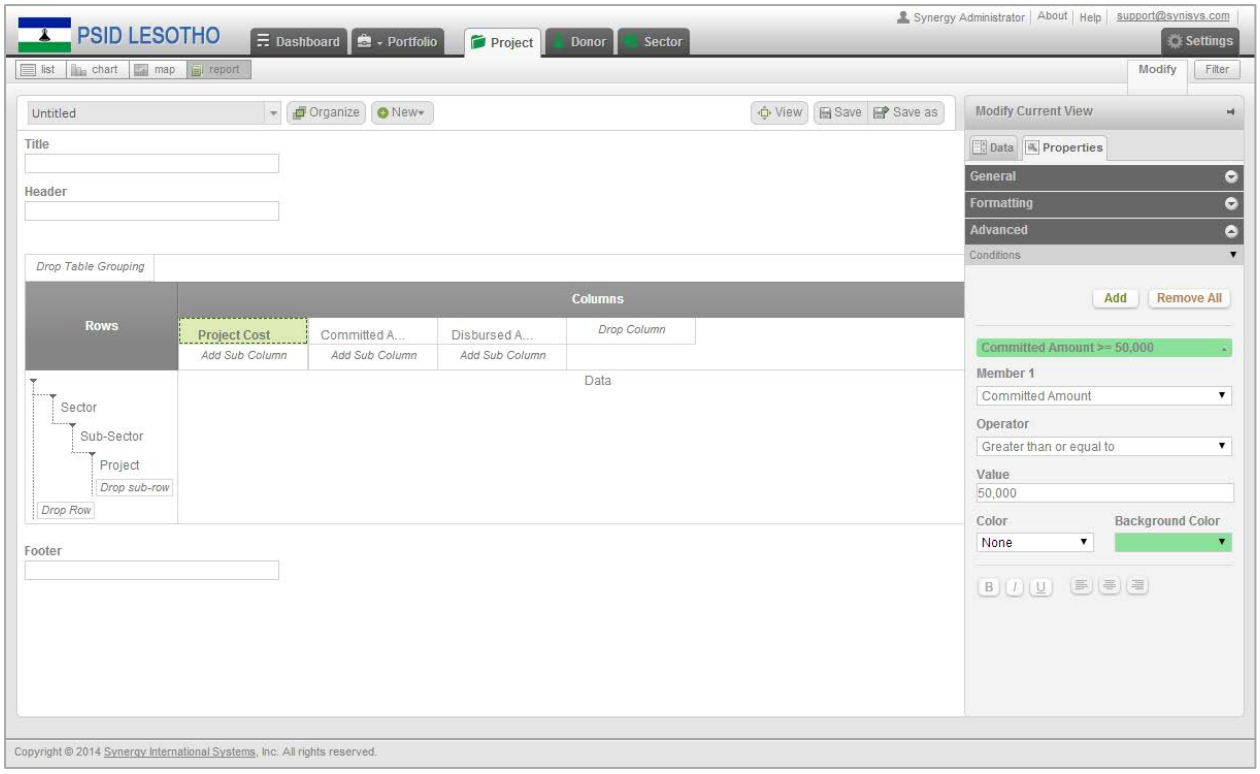


Figure 56: Setting Condition to Report Table Components

Note: To delete a condition, click the **Remove All** button in the *Advanced* sub-tab under the *Properties* tab (Figure 56).

To create a filtering condition for a freeform report rows, follow the steps below:

1. Click the **Modify** button in the reporting options bar. The *Modify Current View* panel will appear.
   Note: You should switch to the *Design* mode.
2. Click the report component that needs to be assigned conditional formatting.
3. Expand the **Advanced** sub-tab under the *Properties* tab.
4. Select a **Category** from the respective drop-down list (Figure 57).
5. Select a **Condition** from the respective drop-down list.
   Note: Depending on the selected category, the instances in the drop-down list may vary, and additional fields may appear.
6. Specify the condition **Value** in the respective field.
7. Preview the report by pressing the View **(View)** button in the main toolbar. The final report will only contain the data that meets the condition set.

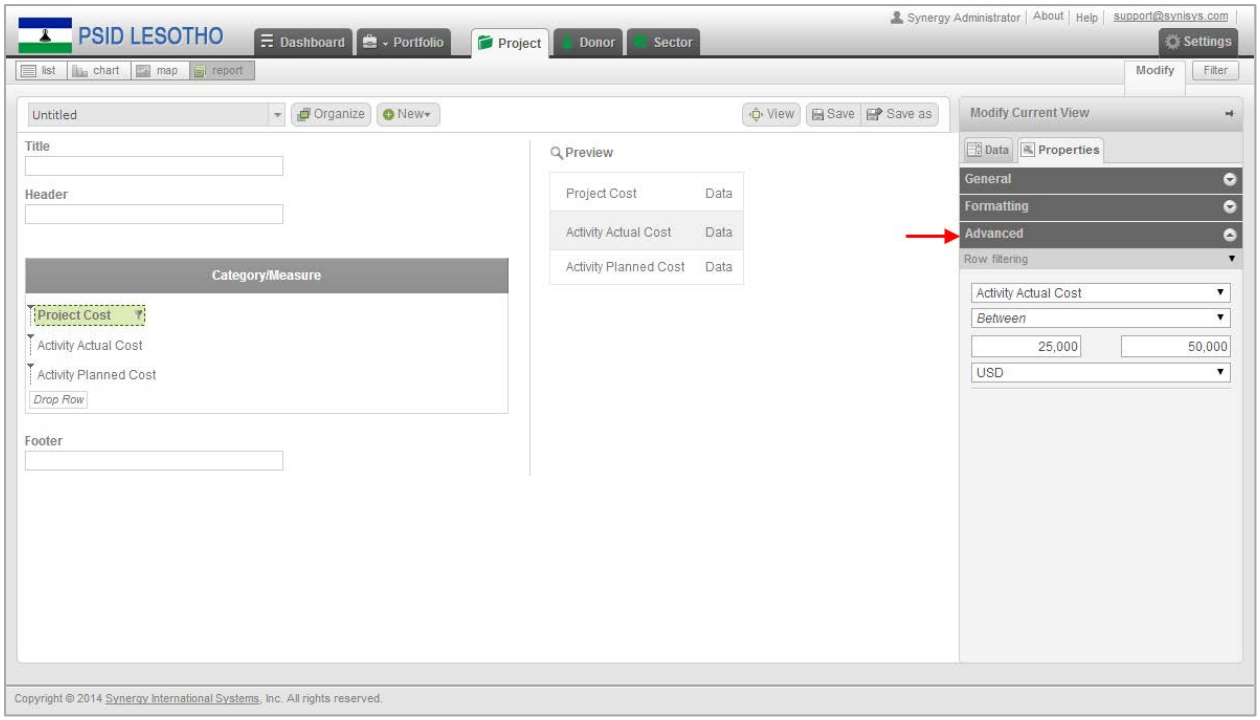


Figure 57: Setting Condition to Freeform Report Components

10.6.3 Sorting Report Table Components

You may change the order in which the table components will appear in the final report. The report table components can be sorted either in an *Ascending* or *Descending* order.

To sort the tabular report components, follow the steps below:

1. Click the **Modify** button in the reporting options bar. The *Modify Current View* panel will appear (Figure 58).
2. Click the component item for which the sorting order needs to be changed.
3. In the *General* sub-tab under the *Properties* tab, define whether the report item values should be sorted in the ascending or descending order. Please note that selecting the **None** option from the list removes the sorting criteria.

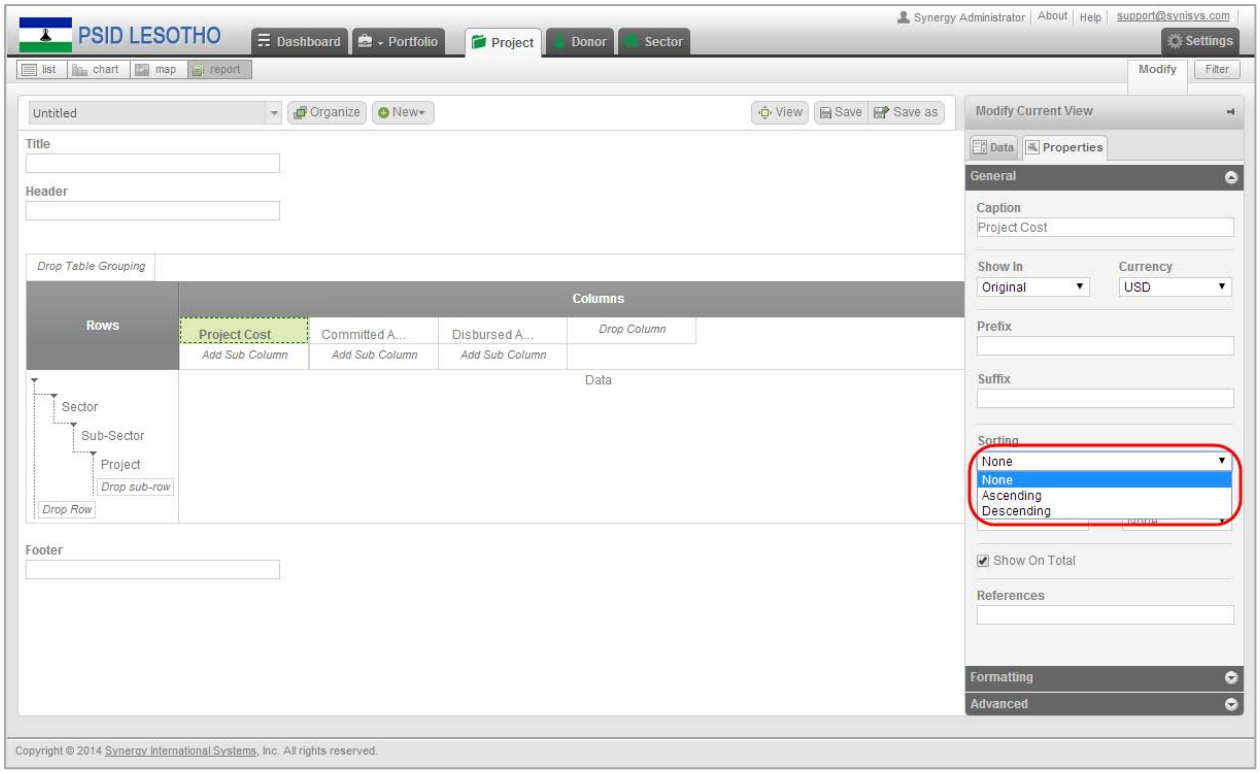


Figure 58: Defining the Sorting Order

10.6.4 Removing a Report Table Component

It is possible to remove a report table component from being included in the report, if this is necessary.

To remove a report table component, follow the steps below:

1. Switch to the *Design* mode by clicking the Design **(Design)** button in the main toolbar.
2. Hover the mouse over the report component item that needs to be removed.
3. Click the **(Remove)** button that appears next to the selected category. The selected component will be removed from the report.

11. DETAILS SECTION

The *PSID Lesotho* application has a built-in *Details* section, where you can view detailed information on dataset instances, e.g. project, donor, or sector, registered in the application.

The *Details* section can be accessed from the *Portfolio* section and *List, Chart,* and *Map* modules. In the *Details* section, you can view detailed project information or edit it if you have the corresponding permissions.

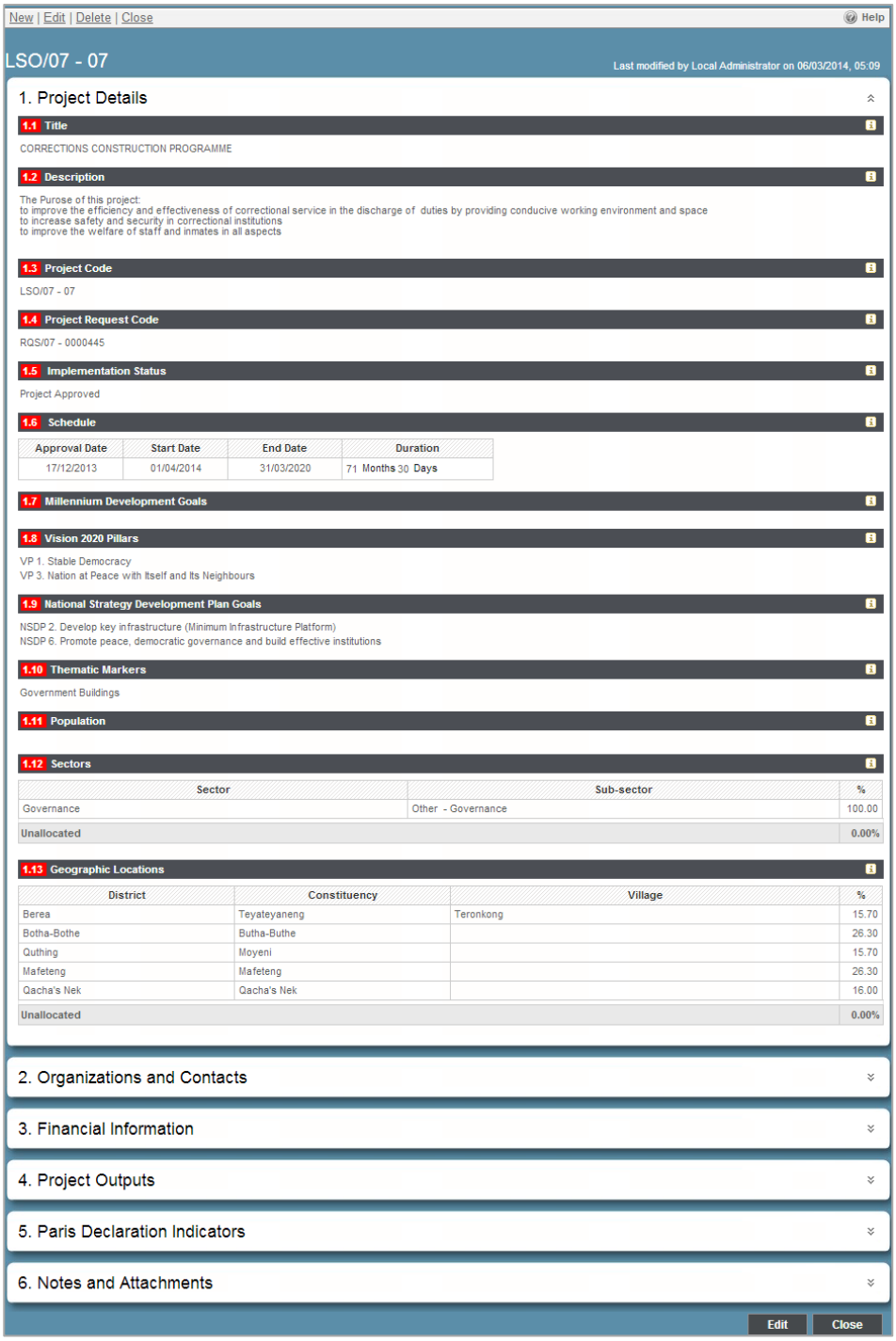

New | Edit | Delete | Close
Help
LSO/07 - 07
Last modified by Local Administrator on 06/03/2014, 05:09
1. Project Details
1.1 Title
CORRECTIONS CONSTRUCTION PROGRAMME
1.2 Description
The Purose of this project:
to improve the efficiency and effectiveness of correctional service in the discharge of duties by providing conducive working environment and space
to increase safety and security in correctional institutions
to improve the welfare of staff and inmates in all aspects
1.3 Project Code
LSO/07 - 07
1.4 Project Request Code
RQS/07 - 0000445
1.5 Implementation Status
Project Approved
1.6 Schedule
Approval Date | Start Date | End Date | Duration
17/12/2013 | 01/04/2014 | 31/03/2020 | 71 Months 30 Days
1.7 Millennium Development Goals
1.8 Vision 2020 Pillars
VP 1. Stable Democracy
VP 3. Nation at Peace with Itself and Its Neighbours
1.9 National Strategy Development Plan Goals
NSDP 2. Develop key infrastructure (Minimum Infrastructure Platform)
NSDP 6. Promote peace, democratic governance and build effective institutions
1.10 Thematic Markers
Government Buildings
1.11 Population
1.12 Sectors
Sector | Sub-sector | %
Governance | Other - Governance | 100.00
Unallocated | 0.00%
1.13 Geographic Locations
District | Constituency | Village | %
Berea | Teyateyaneng | Teronkong | 15.70
Botha-Bothe | Butha-Buthe | | 26.30
Quthing | Moyeni | | 15.70
Mafeteng | Mafeteng | | 26.30
Qacha's Nek | Qacha's Nek | | 16.00
Unallocated | 0.00%
2. Organizations and Contacts
3. Financial Information
4. Project Outputs
5. Paris Declaration Indicators
6. Notes and Attachments
Edit
Close

Figure 59: Project Details Section

11.1 Accessing the Details Section

To access the *Details* section, click one of the following:

- In the *Portfolio* section: Click the respective project. The actions menu will appear. Select the **View** option from the actions menu. You will be directed to the *Details* section (Figure 59).
- In the *Chart* module: Click the chart for the details to be displayed (e.g., click a relevant bar to see what it consists of). This will open the *Details* section of the application where all items matching the selection will be listed. Select the project to view its details.
- In the *Map* module: Point the mouse cursor on the object on the map. The information window will appear. In order to access the *Details* section, select the **View Projects** link. This will open the *Details* section. Select the project to view its details.
- In the *List* module: Click the dataset instance the details of which you want to access and select the **View** option from the actions menu that appears. This will open the *Details* section where more detailed information about the selected dataset instance will be displayed.
  Note: Depending on the list representation settings, additional expanding the list items may be required to reach the dataset instance.

11.2 Browsing Dataset Instances

If you access the *Details* section from the *Chart* and *Map* modules, you may be required to browse among the dataset instances recorded in the system to locate the one that you want to have more detailed information about.

To browse project records, use the respective page number found at the bottom of the projects table. Click the respective dataset instance record to view its details.

11.3 Editing an Existing Dataset Instance

In the *Details* section, you may edit those existing dataset instances that you have permissions to manage.

To edit an existing project, follow the steps below:

1. Click the **Edit** button at the top of the *Details* window (Figure 59). The respective form will appear. It is described in the corresponding user manual in REFERENCES.
2. Make the appropriate changes in the form and save them.

11.4 Deleting an Existing Dataset Instance

In the *Details* section, you may delete those existing dataset instances that you have permissions to manage.

To delete an existing dataset instance, click the **Delete** button at the top of the *Details* window (Figure 59).

12. CUSTOMIZED REPORTING

The *PSID Lesotho* application allows you to customize the pre-defined reports stored in the *Dashboard* and *Portfolio* sections as well as the reporting modules in the existing datasets, i.e. save reports, export them to the desired format or print them. You may also re-organize the reports in the desired way, i.e. include them into a group of reports or create a new report group for them, rename them, etc.

12.1 Saving Reports

After creating reports of different types, you can save them as pre-defined reports and include them either in the *Public* or *My* report groups. Please note that reports stored in the *Public* group are available to all users who access the application, while the reports in *My* group can be managed by the user who created them.

There are two ways of saving a report in the *PSID Lesotho* application. You can save a newly-created report or save a copy of an existing report with a different name, in a different location, or with a different content.

12.1.1 How to Save New Reports

To save a report created, follow the steps below:

1. Click the Save button in the main toolbar. A new window will appear (Figure 60).
2. Define the report name.

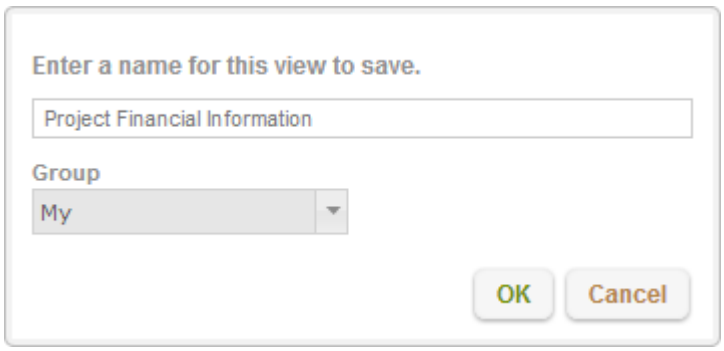


Figure 60: Memorizing a Report

3. Specify the group the report will be included in by selecting the appropriate value from the *Group* combo box.
4. Click the **OK** button to save the report for future reference. Or, click **Cancel** to terminate the operation.

12.1.2 How to Save a Copy of the Report

In the *PSID Lesotho* application, you can save a copy of an existing report. The copy of the report can be saved in a different location, with a different name or edited content.

To save a copy of a report, follow the steps below:

1. Click on the Save as button in the main toolbar. A new window will appear (Figure 60).
2. Save the report following the steps described in the section above.

12.2 Re-organizing Reports

You can organize the reports in the desired way, i.e. rename the reports, create groups to include reports under them, etc.

To organize the reports, click the respective Organize **(Organize)** button in the main toolbar. You will be switched to the *Organize* mode (Figure 61). In this mode, the following actions will be available to you:

- Renaming Reports and Report Groups
- Deleting Reports or Report Groups
- Adding a Sub-group
- Moving Reports

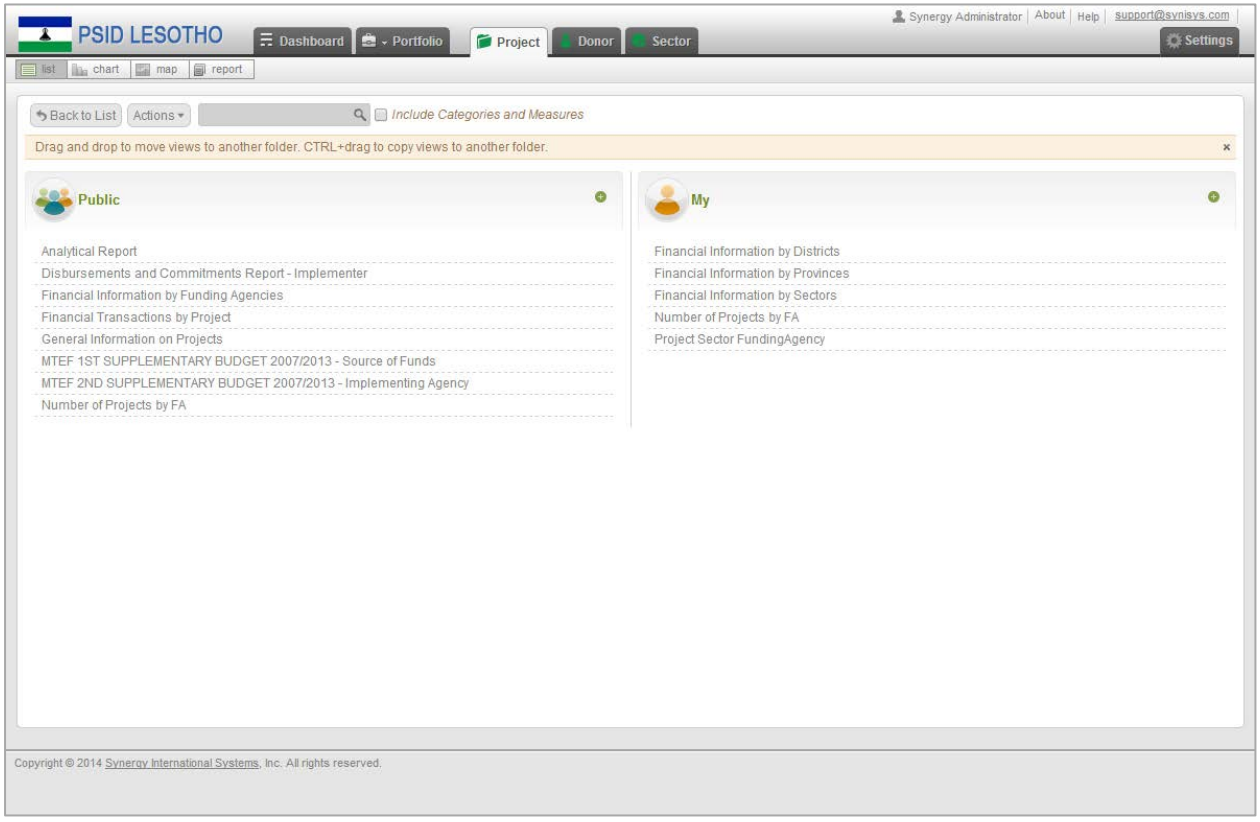


Figure 61: Organizing the Reports

12.2.1 Renaming Reports and Report Groups

To rename a report/report group, follow the steps below:

1. Select the report/report group to be renamed.
2. Click the **(Edit)** button on the right of the report/report group name (Figure 62).
3. Fill in the desired name for the report/report group.

4. Click the **Enter** keyboard button to confirm renaming.

Note: *Public* and *My* groups cannot be renamed.

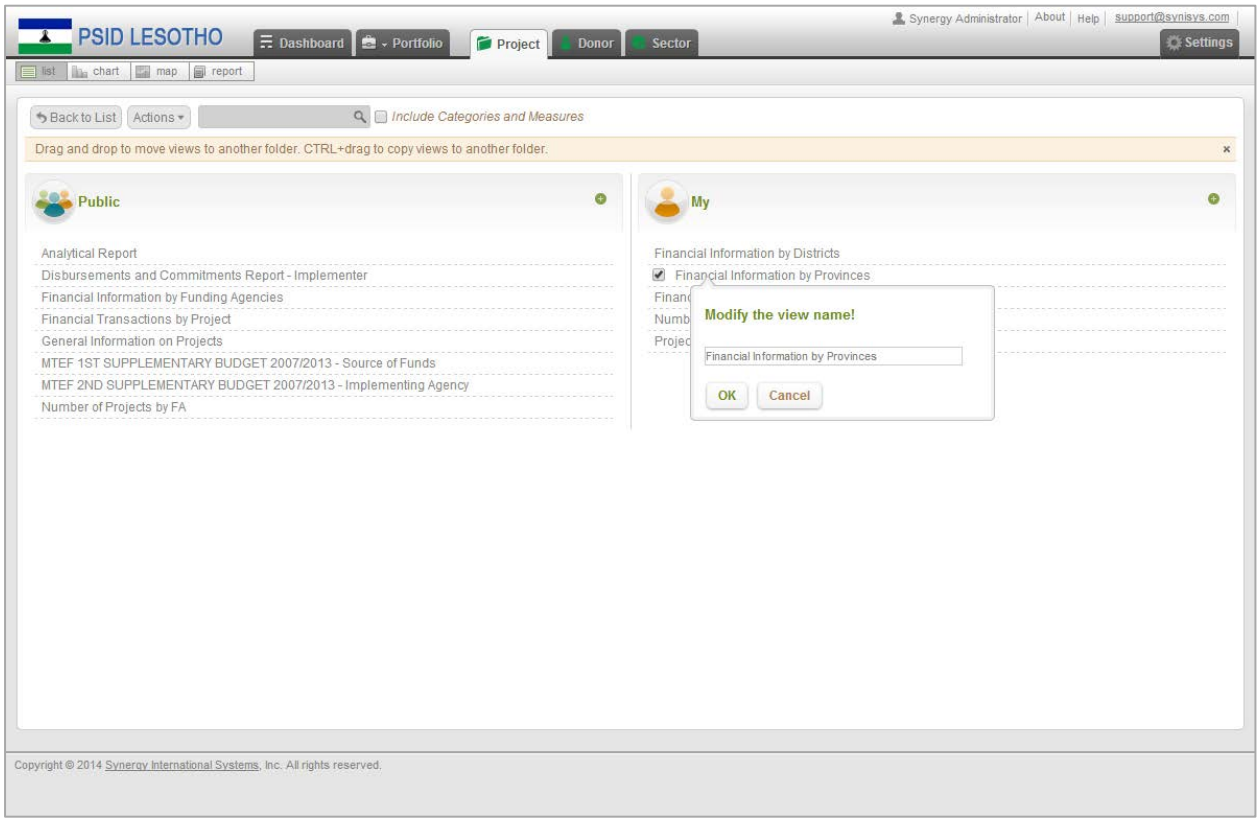


Figure 62: Renaming the Report

12.2.2 Deleting Reports or Report Groups

To delete a report/report group, follow the steps below:

1. Select the report/report group to be deleted.
2. Click the **(Delete)** button next to the report/report group (Figure 62). Or, select the **Delete All** option from the *Actions* menu (Figure 63).
3. Click the **OK** button to confirm deletion.

Note: *Public* and *My* groups cannot be deleted.

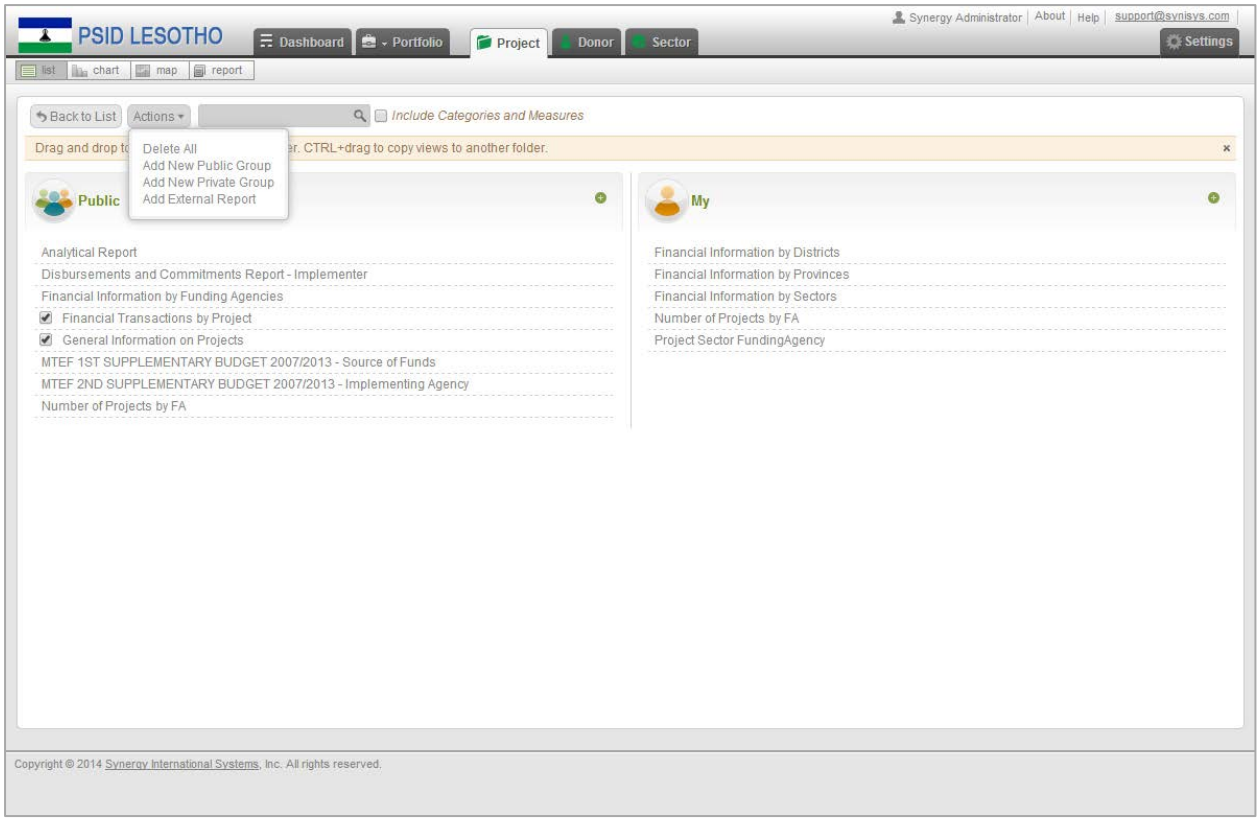


Figure 63: Actions List in the Organize Mode

12.2.3 Adding a Sub-group

To add a sub-group, follow the steps below:

1. Click the **(Add Group)** button next to the *Public* or *My* group (Figure 62). Or, select the **Add New Public Group** or **Add New Private Group** option from the *Actions* menu (Figure 63).
2. Fill in the desired name for the sub-group.
3. Click the **Add** button to confirm adding.

12.2.4 Moving Reports

To move reports, follow the steps below:

1. Select the report that needs to be moved into another report group.
2. Drag-and-drop the selected report into the desired group.

12.3 Viewing Pre-defined Reports

In the *Dashboard* and *Portfolio* sections as well as the reporting modules in the existing datasets, you can view the pre-defined reports stored under *Public* or *My* section for data analysis and comparison. For this purpose, click the report title to display. The selected report will open in the application workspace.

12.4 Editing Pre-defined Reports

To save you the time and effort of structuring a report from the scratch when it is necessary to introduce some modifications in any of the pre-defined reports stored under *Public* or *My* sections, the *Design* mode has been implemented in the *PSID Lesotho* application.

To edit a pre-defined report, click the report name. The selected report will load in the application window. Switch to the *Design* mode to see the selected report structure. Make the appropriate changes in the report structure as described in the appropriate section of the present document. You may also format and style the report components in the desired way. To keep the modifications made to the report, save it (see Saving Reports).

12.5 Searching Reports

The *PSID Lesotho* application is equipped with a search mechanism, which allows searching for any pre-defined report.

To find a report, follow the steps below:

1. Switch to the *Organize* mode by pressing the Organize **(Organize)** button in the main toolbar.
2. Type the text to search for directly into the search box (Figure 64). The search results will display the reports the titles of which match the search criteria.

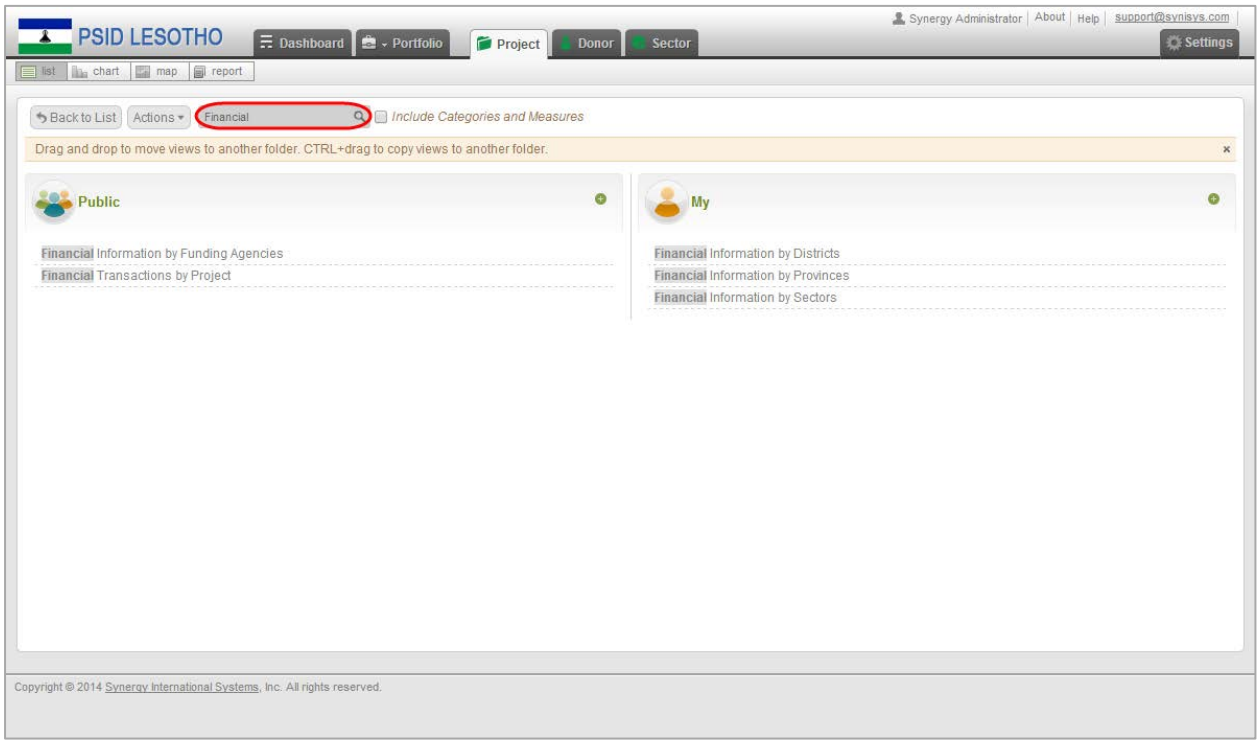
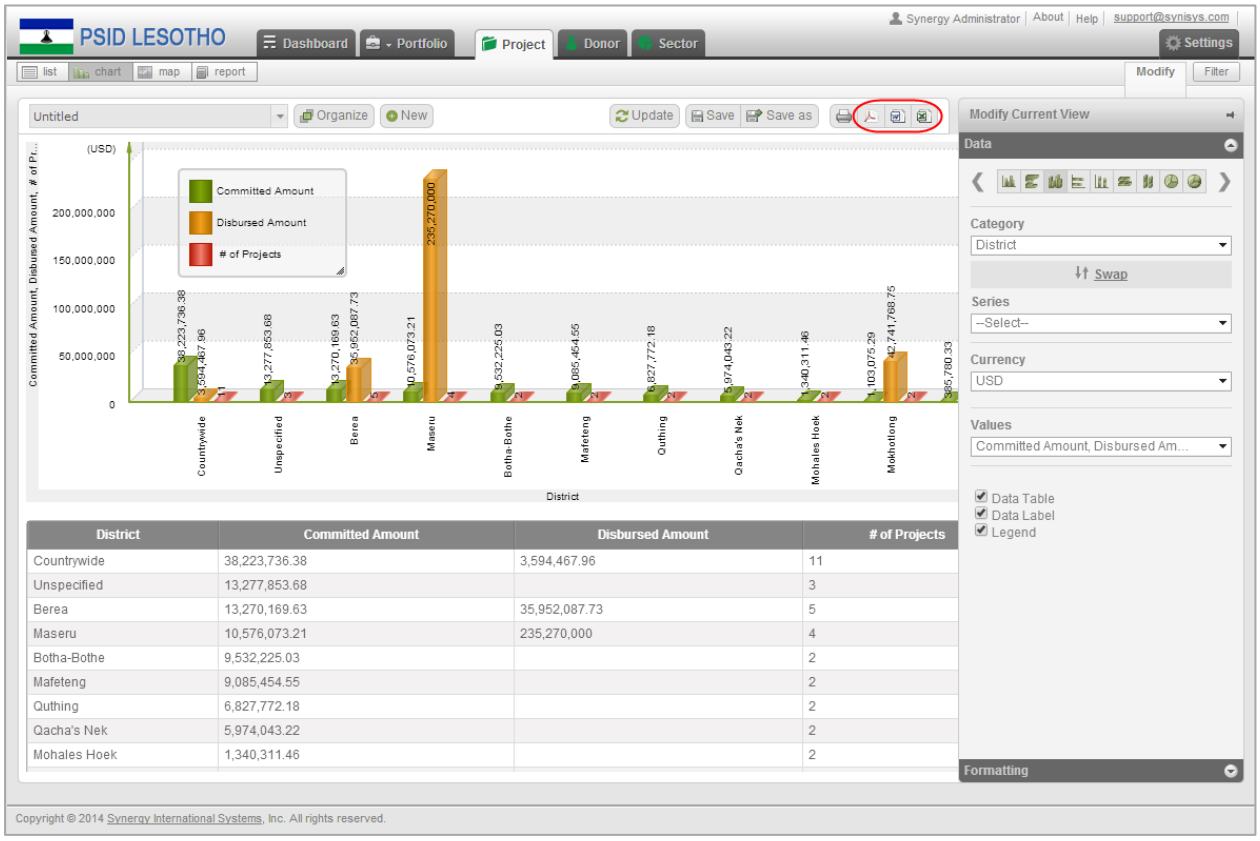


Figure 64: Searching for a Report

12.6 Exporting Reports

From the *Chart*, *Map*, and *Report* modules, you can design appropriate reports and export them in the PDF, MS Word and MS Excel formats.



District	Committed Amount	Disbursed Amount	# of Projects
Countrywide	38,223,736.38	3,594,467.96	11
Unspecified	13,277,853.68		3
Berea	13,270,169.63	35,952,087.73	5
Maseru	10,576,073.21	235,270,000	4
Botha-Bothe	9,532,225.03		2
Mafeteng	9,085,454.55		2
Quthing	6,827,772.18		2
Qacha's Nek	5,974,043.22		2
Mohales Hoek	1,340,311.46		2

Figure 65: Exporting a Report

To export the reports in the PDF, MS Word and MS Excel formats, follow the steps below:

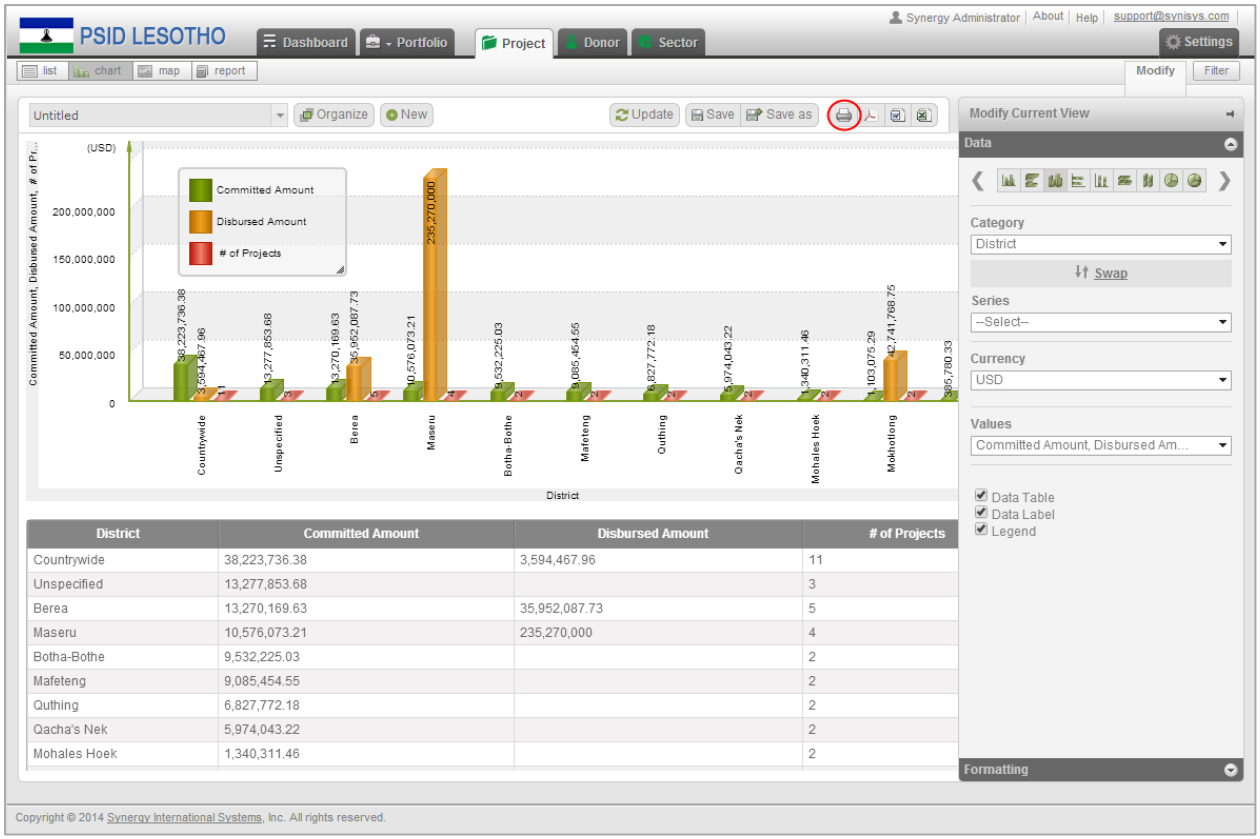
1. Click on the respective **(Export in PDF Format)** / **(Export in MS Word Format)** / **(Export in MS Excel Format)** button in the main toolbar (Figure 65).
2. Save the report, if necessary.

12.7 Printing Reports

From the *Chart*, *Map*, and *Report* modules, you can design appropriate reports and print them out.

To print out the selected report, follow the steps below:

1. Click the **(Print)** button in the main toolbar (Figure 66). A separate window will open.
2. Select the *Print* option.



District	Committed Amount	Disbursed Amount	# of Projects
Countrywide	38,223,736.38	3,594,467.96	11
Unspecified	13,277,853.68		3
Berea	13,270,169.63	35,952,087.73	5
Maseru	10,576,073.21	235,270,000	4
Botha-Bothe	9,532,225.03		2
Mafeteng	9,085,454.55		2
Quthing	6,827,772.18		2
Qacha's Nek	5,974,043.22		2
Mohales Hoek	1,340,311.46		2

Figure 66: Printing a Report

13. FILTERING

The system allows for data filtration. Filtering is used to narrow down the information displayed in the reports. The filtration works in the Step-by-Step technology, which is used to implement new filtering over the results of the previous one. This option reduces the size of reports and makes them easier to read. Filters can be added to new or existing reports. Defined filtering is available in the *Portfolio* section and in the *List*, *Chart*, *Map*, and *Report* modules.

13.1 Creating Filtering Criteria

To create filtering criteria, follow the steps below:

1. Click the **Filter** tab in the reporting options bar (Figure 67).
   Note: The *Filter* tab will be closed when clicking somewhere outside the tab area. To keep the *Filter* tab open, pin it to the screen.

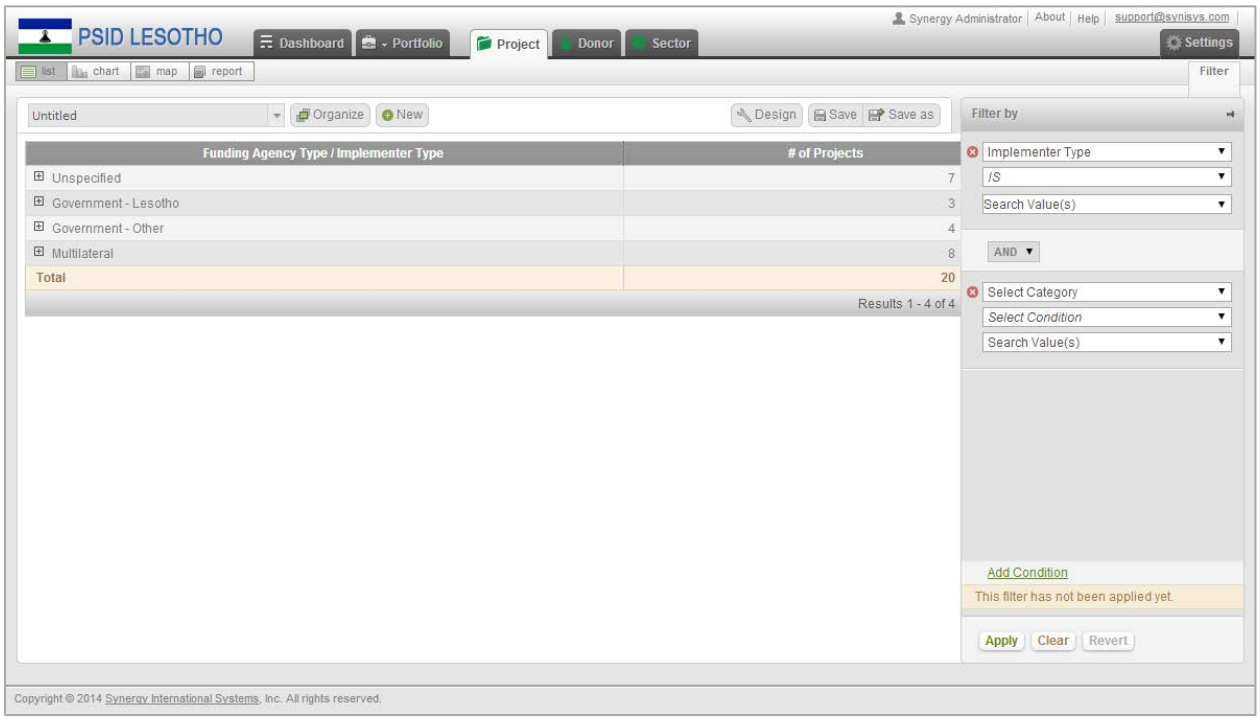


Figure 67: Creating a Filtering Criteria

2. Select the category according to which the filtering will be carried out from the drop-down list. Please note that selection of a category will define the content of the filtering condition drop-down list displaying only those values that are related to the selected category.
3. Specify the filtering condition. The following options are available:

Filtering Condition	Description
Is	The filter should exclude all category items that do not have the selected category value.
Is not	The filter should exclude all category items that have the selected category value.

Is unspecified	The filter should include all category items with unspecified values.
Contains	The filter should include all category items that contain the keyword entered in the text area.
Does not contain	The filter should exclude all category items that contain the keyword entered in the text area.
Begins with	The filter should include all category items that begin with the keyword entered in the text area.
Between	The filter should include all category items that are in the selected range.
Not between	The filter should include all category items that are out of the selected range.
Equal	The filter should include the category items with values equal to the selected category value.
Is not equal to	The filter should exclude the category items with values equal to the selected category value.
Greater than	The filter should exclude the category items with values less than the selected category value.
Greater than or equal to	The filter should exclude all category items with values smaller than the selected category value.
Less than	The filter should exclude all category items with values greater than the selected category value.
Less than or equal to	The filter should exclude all category items with values greater than the selected category value.
Top	The filter should include all category items that are included in the selected top count of the selected category.

4. Define the category value.
   Note: The content of the category value drop-down list depends on the selected category.
5. Add more filtering criteria by clicking the **Add Condition** link and repeating the steps described above.
   Note: To define the relation between the results of the two sets of filtering criteria, the **AND / OR** logical operators are used. If the **AND** operator is used, only the category items that satisfy both conditions will display. If the **OR** operator is selected, the filtering results will contain the category items that satisfy any of the conditions applied.
6. Click on the **Apply** button to apply the filtering to report. The system will regenerate and re-load an updated report that includes the updated filtering criteria.

13.2 Viewing Filtering Criteria Applied

To view filtering criteria applied to a report, follow the steps below:

1. Go to the section that contained a report with filtered data.
2. Hover the mouse over the respective icon displayed in the *Filter* tab.

13.3 Removing Filtering Criteria Applied

To remove filtering criteria applied to a report, follow the steps below:

1. Go to the section that contained a report with filtered data.
2. Click the icon displayed in the *Filter* tab.
   Alternatively, you may expand the *Filter* tab and click the **Clear** button.

Note: It is possible to restore the setting of the initial filter by expanding the *Filter* tab and clicking the **Revert** button.

14. LOGGING OUT

Once you have finished using the *PSID Lesotho* application, it is necessary to log out. To log out from the application, click your account name in the upper right corner of the application window and then click the **Logout** link.

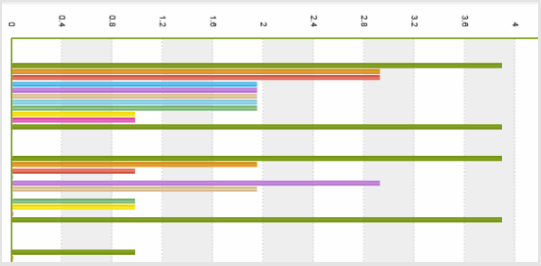
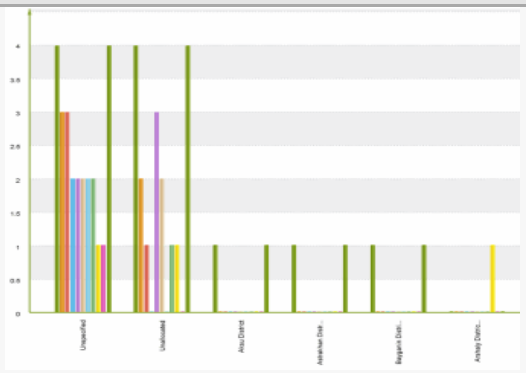
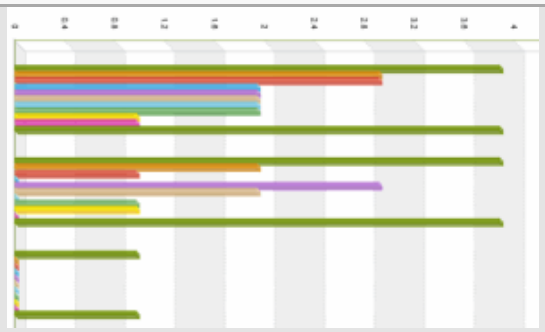
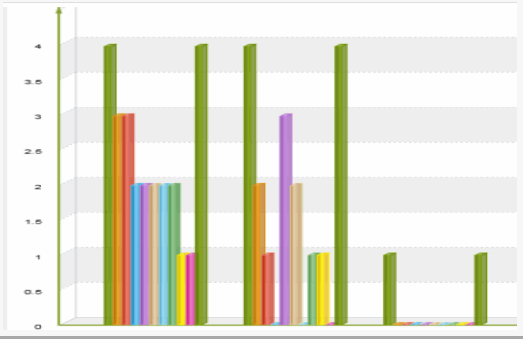
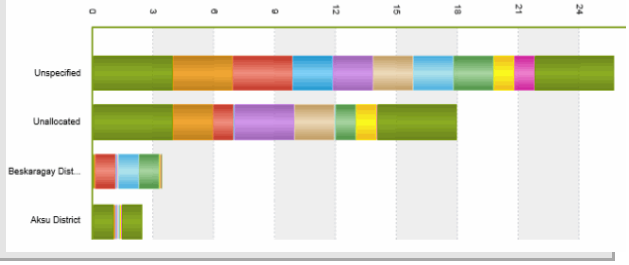
15. REFERENCES

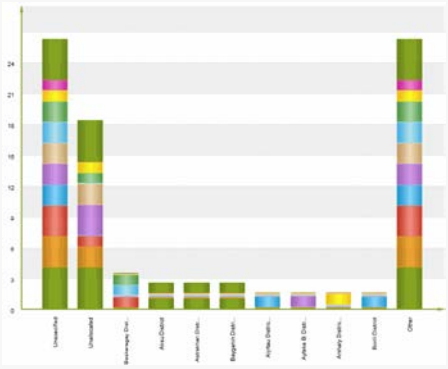
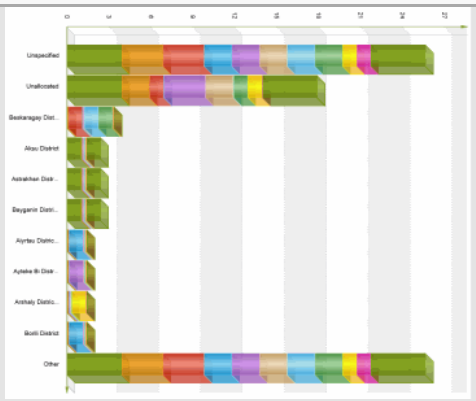
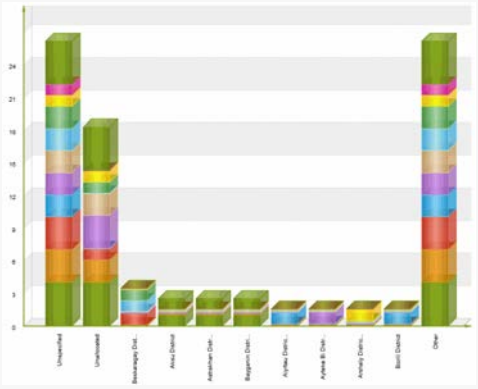
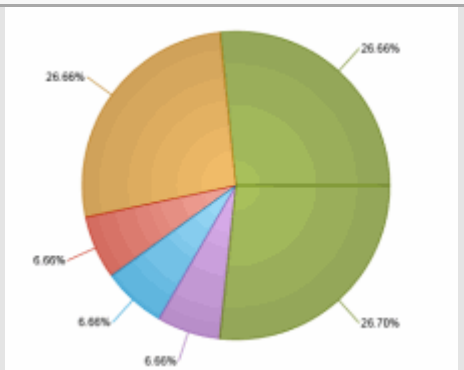
Please refer to the following PSID Lesotho related documents:

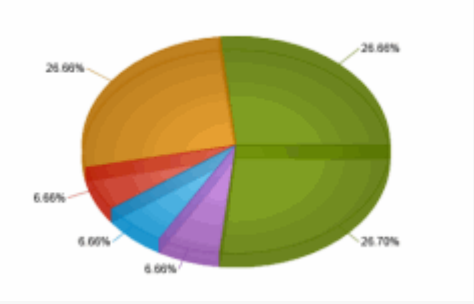
- PSID Lesotho User Management Administrator's Guide
- PSID Lesotho Data Management Administrator's Guide
- PSID Lesotho Project Application User Manual
- PSID Lesotho Sector Application User Manual
- PSID Lesotho Donor Application User Manual

APPENDIX I: CHART TYPES

The table below presents the chart types available in the *PSID Lesotho* application:

#	Icon	Chart Type	Sample Chart
1		Bar	
2		Column	
3		Bar 3D	
4		Column 3D	
5		Stacked Bar	

6		Stacked Column	
7		Stacked Bar 3D	
8		Stacked Column 3D	
9		Pie	

10		Pie 3D	
11		Line